

December 08, 2022

DEAR

We are doing returns like last year: you can mail-in/drop-off/upload/schedule an appointment to get this year's tax information to us. This provides you with what you need while providing us with a measure of sanity during our months-long tax season. Because of increased business costs fees have increased. We will not open emailed tax forms: we have a portal link on our website.

Completion options (all **must fill out** attached sheets and be in or scheduled by April 1<sup>st</sup>):

1. Drop off\* - Get your info to us, we call you when it is done or if there is questions. Completion takes us at least two weeks depending on volume and day dropped off as well as completeness of paperwork. It must be to us by **April 1<sup>st</sup>** - possible \$20 discount, no discount after March 31<sup>st</sup>. If you have no questions this is our recommendation. You will not see an accountant with this option.
  - Drop off options: (1) In the slot in the window that drops into the building (2) Portal upload (3) Mail to PO Box 283; Sartell, MN 56377(4) Fax to 320-252-2430 (5)Hand to the front desk.
  - Please pickup within 7 days of completion or you will not receive the drop off discount. If we have to extend due to not picking up your return, we will charge an additional \$35.
2. Business/farm appointment\* - 1+ hour schedule online or call the office.
3. Regular appointment\* - Due to high call volume please schedule online or call and leave a voicemail.
4. Zoom meeting\* - Upload info to the portal at least 2 weeks in advance of your online scheduled appointment. Indicate with upload appointment time and date. If you drop off your info we will call you to schedule the zoom. Indicate on your organizer (attached) that you would like a zoom.

*\*exceptions apply, subject to client needs*

We will begin processing January 23<sup>rd</sup> for drop offs only. The regular hours and appointments will start January 30<sup>th</sup>. The office hours will be Mon-Fri 9:00am-6:00pm and Sat 10:00am-3:00pm, or by special arrangement. If there are questions for/from Diane and Christie, we will be scheduling a time for call back, due to the extremely busy schedule they follow. Please save our number 320-656-9021 and answer your phone when we call, especially a scheduled call.

This year we are offering an expedited service. Depending on the complexity of your return this would allow your return to be processed in 1 to 3 business days. This service only available for drop off **in person**, or portal upload. Our charge for this service is an additional \$50.

#### **TIPS TO MAKE TAX PREPARATION RUN SMOOTH**

1. PLEASE VERIFY YOUR ADDRESS, EMAIL ADDRESS, AND BANKING INFORMATION.
2. Please open your mail, we spend countless hours opening mail. Please take the paperwork out of the envelope place on a neat no staples pile. A \$30 surcharge will be added if we open your mail.
3. Please do not send me your medical receipts, just recap them in the organizer.
4. Do not staple or tape your documents.
5. Property tax refunds will be processed in August.
6. As a reminder, your return will not be ready for pickup until we call you.

REMINDER: We are requiring you to fill out the attached information and bring all original documents. If we are missing your filled out questionnaire, this will extremely delay our processing of your return and you could incur an additional charge. Our website **www.sartelltaxservice.com** has more information. Also, if you have any questions please feel free to contact us at **320-656-9021** or email **info@sartelltaxservice.com**. We look forward to serving you.

Sincerely,  
*Diane St. Sauver*  
Diane St. Sauver  
Certified Public Accountant

*Christie L. Szabla*  
Christie L. Szabla  
QuickBooks ProAdvisor