

# Sheehan Consulting

Joseph P. Sheehan, CPA

Certified Public Accounting • Small Business Advising

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Dear Clients:

2020 has certainly been a challenging year for all of us. The current Covid-19 situation has forced us to make some big changes to how we will operate for the 2020 Tax Return Season.

**We will not be doing any in-person meetings or drop-offs for the foreseeable future.**

We now have a new **Secure File Transfer Portal** on the internet for exchanging documents in a safe and secure manner. This portal will also allow us to **obtain your signature electronically** on the e-file authorization forms. **All clients will be required to set up an account on the new portal as we will no longer be providing paper copies of tax returns.** All completed 2020 tax returns, payment coupons, signature pages, and invoices will be uploaded to this secure site and accessible to you through your secure login. If you wish to have us mail you a paper copy of your return, there will be an additional charge of \$30. If you need to discuss your taxes over the phone, we will be glad to do that. We have found that for us, and for most of our clients, the preferred and most efficient method of communication is e-mail.

**If you have not received an activation e-mail yet from our Secure File Pro system, it means we do not have an accurate e-mail address for you, (please check your junk mail folder). Therefore, you need to e-mail me and I will add your e-mail address to the system and send you an activation e-mail to set up your account. The activation e-mail will come from [no-reply@securefilepro.com](mailto:no-reply@securefilepro.com).**

Once you have set up your new online account, you will see that a tax organizer has automatically been uploaded to your account. **The tax organizer is provided as a guide for you, and it is not required to be used or returned to us.** You will also be able to upload your tax documents to us securely through the website if you choose. If not, you will still be able to send in your documents via regular mail, e-mail, or you can drop them off through our mail slot in the door. If you drop off through our mail slot, please place your documents in a sealed envelope. If you choose to e-mail your documents, keep in mind that e-mail is not a secure method for transferring files.

Thank you for your continued loyalty and ongoing referrals. I hope you have a great holiday season and wish you the best for a safe and healthy 2021.

Sincerely,

Joseph P. Sheehan, CPA