

2020 Tax Return Preparation

Tax season is quickly approaching! Simplified Tax Solutions and Platinum Wealth Management Group have once again partnered up to offer tax preparation to help you get through April 15th as stress free as possible. To address the concerns of the Covid-19 pandemic, we have built off last year's model to ensure a smooth and safe experience during this tax season!

What is New?

This year we will be moving entirely virtual. This is not only for your safety, but to ensure we are able to complete and file your returns efficiently. Since privacy is one of our main concerns, we are implementing a new client portal this year. The portal allows a secure sharing of your documents and will give you easy access to any of your previous tax returns we have filed. We will email you instructions on how to sign into your portal.

What Should I Expect?

This year there are now three ways to have your taxes completed. With any of the methods, please complete the tax organizer to help ensure that all your documents and information is present and accurate. Your three options are:

- 1) Upload your documents
- 2) Drop-off your documents at the office
- 3) Mail-In your documents

To keep the face-to-face experience, we are offering you the option to meet virtually through Zoom to discuss your tax documents or review your completed return.

How Do I Schedule A Zoom Meeting?

We strongly encourage scheduling on our website: www.simplifiedts.com/schedule. For those who wish to schedule over the phone, please call (248) 266-3004.

How Do I Sign and Get My Taxes Back?

Once your taxes are completed, you will have access to them and your source documents through the portal. The portal also allows you the option to eSign your tax return. If you prefer, you will also be able to print and mail in the form or we can mail you a copy to sign and return. We will keep the physical copies under lock and key in our office until the climate is safe for you to come pick up your documents. If you would like them quicker, we can send them overnight to you for a small fee.

Do We Offer Tax Prep for Non-Platinum Clients?

Of course! We would be happy to help your family, friends, and neighbors with their taxes.

Still Have Questions?

Please feel free to give us a call at (248) 266-3004 or email us at mstojkov@simplifiedts.com!

Sincerely,

Matthew Stojkov

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