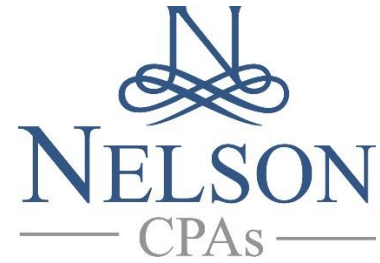


Important Information for the 2020 Tax Season



Dates to Remember

Income Tax Returns are due this year on April 15, 2020.

To ensure your tax return will be filed on time, we MUST have your completed Organizer, signed Bank Information Form, signed Engagement Letter, and most of your documents by Monday, March 9, 2020.

Documents you haven't received by March 9 can be delivered to our office as you get them.

You may drop your documents off at the front desk, use the drop box in our vestibule, mail them, or put them in your secure Nelson CPAs portal.

You may still ask us to do your tax return after March 9, but we may need to extend your return. There is an additional charge for extensions.

Secure Portals

Online portals are available to all clients. Portals enable us to send sensitive information back and forth in a secure manner. If you have access to a computer, please consider using a portal.

If you don't already have a secure portal set up with Nelson CPAs and would like one, call or email Mary Love (mlove@nelsoncpasmn.com). After your portal is set up, you will receive an automatic email from our system with a temporary password and information on how to sign into your portal.

For more information on registering for the portal **and detailed information on using the portal**, consult the directions on our website:

1. Go to our website (www.nelsoncpasmn.com)
2. Click on the "Client Resources" tab and then on the "Portal Instructions" tab
3. Open and read the "Client Portal Agreement"
4. Click on the "Portal Registration Instructions" and "Instructions on Using the Portal"

Once you are in your portal you will notice several folders on the left side of the screen.

1. Portal-Tax — Do not put anything here.
2. Action Required by Client — This is where **Nelson CPAs** will upload documents you need to read and/or download to sign.
3. Information for Nelson CPAs — **Upload your documents to this folder.**
4. Reviewed by Nelson CPAs — We will move any documents you upload to this folder after we have reviewed them. Documents will remain here until your tax return has been completed. Refer to this folder if you want to know what you have already sent.
5. Tax Returns — A copy of your completed tax return will be put here if you choose a "portal copy."
6. Other — Used by Nelson CPAs for a variety of reasons.

Sensitive Information

We take guarding your personal data very seriously and want to ask you to do the same. Please do NOT send us any personal information (birth date, social security numbers, passwords, etc.) through an unsecure email. Rather, call us with your information or put it in your secure portal.

Fact Sheets and Information for Tax Preparation

There are many useful Fact Sheets and Tax Tools on our website (www.nelsoncpasmn.com).

When you click on the “News/Info” tab and then “Topical Information” you will find:

- Charitable Contributions
- Higher Education
- Itemizing
- Virtual Currency
- Sharing Economy
- RMDs / Qualified Charitable Donations
- Vacation Homes
- Nanny Tax

Additional information can be found under the “Client Resource” tab. The Client Forms & Instructions sub-tab has worksheets and Fact Sheets for both individuals and businesses. The Government Resources & Information sub-tab has various government forms, links to the IRS, MN Dept. of Revenue, the “Where’s My Refund” website, paying taxes online, and information on how and when the IRS will contact you.

On the Tax Tools tab, you will find Tax Tips, Tax Rates, Due Dates, Financial Tools, and a Retention Guide for storing tax records.

Neighbors, Inc Food Drive

Nelson CPAs, LLC will be supporting Neighbors, Inc in a variety of ways during 2020. We are starting the year off by sponsoring a **food drive throughout the 2020 tax season** and are inviting our clients to participate. When you come to our office to drop off and/or pick up your tax documents, please consider bringing a non-perishable food item to donate to the food drive. Barrels will be in the lobby area for you to place your donation.



Neighbors, Inc is a non-profit, social-service agency providing emergency assistance and supportive assistance programs to low-income community members in the northern Dakota County communities of Inver Grove Heights, South St Paul, West St Paul, Mendota Heights, Mendota, Sunfish Lake, and Lilydale. Neighbors relies on nearly 1,500 volunteers to provide almost all the service. Services offered include a

Clothes Closet, Dial-a-Ride, Nutrition Assistance Program for Seniors, Summer Meals, Holiday Gift Program, Financial Assistance, and a Food Shelf.

Please help us support this worthy cause.

Office Hours Through Tax Season

January 1-February 2, 2020 (NOTE: We will be closed on Feb. 3 for training)

Monday through Friday: 9:00 a.m. to 4:00 p.m.

Tuesday, February 4, 2020 through April 15, 2020

Monday through Friday: 8:00 a.m. to 6:00 p.m.

Saturday: 9:00 a.m. to 2:00 p.m.

Evenings and Sundays by appointment only

We will be closed on April 16, 2020.

Nelson CPAs, LLC
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651-455-4621 www.nelsoncpasmn.com