

Murphy Financial Services, Inc.

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January 09, 2021

Enclosed is your 2020 organizer. Certain lines in the packet contain information from last year's return. You do not need to change the dollar amounts from last year; these figures are provided for reference only.

Please review the entire packet and answer any questions that apply. When you are finished, you can either drop off your information at our office, email or mail it to us, or fax it to us. If you want to email us your information, call our office to arrange for a secure email. We also offer a pickup service for an additional fee. Please return to us your signed engagement letter, your organizer, all W-2s, 1099s, K-1s, real estate tax bills, mortgage interest statements and any other tax related documents. If you had health insurance through the marketplace, please provide us with your form 1095-A.

Clients who have their organizer and ALL their information to us by February 28, 2021 will qualify for the 36th annual Murphy Financial Services, Inc. drawing. The winner will receive a refund of the amount paid to have their 2020 tax returns prepared.

In order to have your tax returns prepared by April 15, 2021 you will need to have all your information in our office by March 22, 2021. Clients bringing in their information after this date will be charged extra if they want their tax returns prepared by April 15, 2021. This is only **if** we have time to complete the returns by the due date.

An alternative to paying the extra charge is to get an extension. An extension allows you to file your taxes by October 15, 2021. This extension does NOT give you an extension to pay your taxes. Taxes are due April 15, 2021. Getting an extension does NOT signal the IRS to audit the return.

We appreciate your trust in our business. Please feel free to call our office at (414)453-8655 if we can of any assistance in completing your organizer or in providing any other tax or accounting services.

Sincerely,

Sharon L Murphy EA
Murphy Financial Services, Inc.