

PROFESSIONAL  
SERVICES

Season's Greetings Family! It is time to start preparing for the 2021 tax season and we want to inform you of some changes that have been made in our office.

First and foremost, we will not be holding any face to face appointments. This is for the safety of our clients and staff. All documentation can be submitted via our secure portal <https://professionalservices.securefilepro.com/portal/#/login> (upload your docs through the Guest Exchange), email to [info@psbtstax.com](mailto:info@psbtstax.com), mail, or dropped off. Once received, we will ensure all requirements have been met and will be processed on a first come, first serve basis.

Tax returns must include the following in order to be put in the queue for processing:

- Payment
  - We accept cash, check, Venmo (@betty-smith-85), Zelle ([info@psbtstax.com](mailto:info@psbtstax.com)) and credit card, but please note credit card payments are subject to a 5% fee.
  - Our fee has gone up \$50 across the board this year. If you have rentals, a small business on your 1040 return the fee could be more. For this fee please email us [info@psbtstax.com](mailto:info@psbtstax.com). Please give 24 hours for a response to your email.
- Signed authorization form for all taxpayers
- Basic taxpayer information sheet (If there have been any changes since last year)
- 3<sup>rd</sup> stimulus amount (April-May 2021), child tax credit payments (July-Dec 2021)
- Any questions you would like Betty to address
- Valid contact number if Betty has questions

Please submit your documentation to us at your earliest convenience. To ensure your taxes are prepared without the possibility of needing an extension, your tax paperwork **MUST** be submitted by April 7<sup>th</sup>. We will automatically file an extension for any documents received after if they will not be completed in time; however, if you need an extension and we do not have your tax documents you need to submit a \$50 fee and extension request. This fee will be applied to your 2021 fee.

When your taxes have been completed, we will notify you using the contact information provided in the updated taxpayer information sheet. We will be sending all completed returns **electronically** this year unless a paper copy is requested.

Please visit our website where we have included all forms required for your tax preparation.

Thank you kindly for your patience and support!

Betty Smith  
[www.bettysmithprofessionalservices.com](http://www.bettysmithprofessionalservices.com)

