

Did you know?

Services We Offer

- ◆ We are open all 12 months, unlike some other tax services.
- ◆ A secure portal system where we can share items electronically.
- ◆ To our clients we offer FREE tax planning Including W4 adjustments and retirement planning.
- ◆ If you receive any correspondence from IRS or any State where we prepared the return just let us know and we will represent you.
- ◆ We offer Bookkeeping and Payroll Service to our business Clients.
- ◆ Want to start a business, we can advise you with entity selection and educate you on recordkeeping.
- ◆ Notary Service for non tax related items.
- ◆ To any organization that would like a tax topic presented we will do so at no charge.

Most important is coffee and tea service plus there are unlimited jolly ranchers to enjoy during your tax appointment.



Ways you can make your Virtual or In Person Tax Appointment

- ◆ Call 520-320-1041 and speak with one of our support staff members.
- ◆ Email 1stChoice@1stChoiceTaxServices.com with your date and time request. Receive a response back within 1 business day verifying if that time is available.
- ◆ Send a secure message through our portal system.

If you don't feel that you need to have an appointment for us to receive your documents that's ok. You can utilize our drop off service or upload your documents from home using our secure portal system. **For security purposes please do not email your documents.**



Your 1st Choice for tax services.

3365 N Campbell Ave Suite 121
Tucson, AZ 85719

Phone: (520)320-1041 • Fax: (520)320-1053

email: 1stChoice@1stChoiceTaxServices.com
www.1stChoiceTaxServices.com



Your 1st Choice for tax services.

Welcoming



www.1stChoiceTaxServices.com



New Address:
3365 N. Campbell Ave
Suite 121
Tucson 85719



For scheduling ease, please call or email us to make your tax appointment as soon as possible.



Coronavirus Precautions

Though we would prefer virtual appointments for this year, we do understand and will service clients who request in person appointments with the following precautions:

Masks will be required to enter the office.

When you come in to the office we ask that use the hand sanitizer station immediately as you enter.

We have a secure drop off slot in the wall to the right side of the front door. Please make sure your documents are in a sealed envelope.



Appointment Options

Virtual: Send items through the portal or drop off. Must receive docs 3 days prior for tax appointment or 1 week prior for review appointment. An invitation will be emailed to you with a link to your secure meeting.

In Person: Must wear mask, have documents organized, receipts totaled and summarized. No children will be allowed in the office.

Specialized Curbside Service: Call when you are in the parking lot. Staff will come and retrieve your docs. Your Preparer will then call you to to review while you wait. This service may not be available to all clients due to the nature of their tax return.

Wow, what a year 2020 was !



This is the place where usually we list all of the tax law changes for the current tax year as well as the changes for future tax years but alas there is not enough space.

Though most tax law changes that have been passed in the last few years have had the word "Simplification" attached with them that is definitely not the case. The good old days of being able to offer generic tax advice is gone since most tax changes are very individualized. Here are some highlights:

- ◆ If you qualify for Refundable Child Tax Credit or Earned Income Tax Credit we now need to compare those 2020 credits to what you received in 2019 to get you the maximum return.
- ◆ If you took an early distribution from your retirement plan we now can possibly spread the taxes out over three years and exempt you from the 10% penalty.
- ◆ If you own a business there are many possibilities and various calculations to assist you with tax savings.

All of the tax professionals at 1st Choice Tax have attended numerous classes and webinars to stay up to date on the many tax law changes and will continue to do so with whatever added changes Congress comes up with next.

THANK YOU

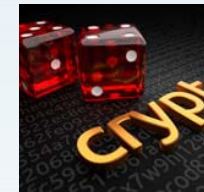


We will not take this achievement lightly and will continue to be "Your 1st Choice" for tax services.

As 1st Choice enters it's 16th year with a new expanded office, we pride ourselves with our personalized client service. We appreciate you choosing us to assist in your tax needs. Because of you, we are now the largest privately owned tax service in Tucson.

We Care about Your Security

1st Choice Tax Services prides itself in being pro active in securing your personal information. One method that has proven to be invaluable is our Portal System. The system is user friendly. We ask that you do not email any attachments to your tax professional but instead upload your documents to the portal. If you have not used it as of yet or even if you need a refresher on how to access just call the office and we will have a "portal expert" to assist during business hours.



The IRS requires information to be reported on your tax return if you deal with crypto currency. Please be sure to answer that question on the enclosed organizer.

For all of our individual tax clients we will need a list of any charitable cash and non cash contributions as Arizona allows a 25% deduction over and above your standard deduction. IRS now allows up to \$300 additional deduction per tax return.



The amounts that you received for stimulus payments in 2020 and early 2021 need to be reported on your 2020 tax return. If you qualify for more than you received, the additional money will be claimed as a credit on this tax return. If you received more stimulus than you qualify for you, will not have to pay it back. Please be sure to fill in those amounts as well as the date the payment was received on your organizer.



Included with this mailing is a 2020 organizer to assist you with organizing your tax return documents. We would appreciate you filling it

out and submitting it with your tax documents. If you prefer a personalized organizer with your prior information pre populated please call the office to request that from our support staff.