

Happy 2021!

While our National office is in charge of mailing out the tax packet and envelope, we have placed our traditional MJW **Tax Organizer** and all inserts you are accustomed to on our site.

Please:

- Fill out and sign the **Authorization for Direct Deposit/Debit**
- Sign the **Engagement Letter**
- Review the **Tax Organizer** for important information
- If this is your first year using our secure client portal, please take a look at the **Canopy** walkthrough to get you acquainted.

*A few important FYIs:*

- *1099G for Unemployment received can only be obtained online at the [CT DOL website](#). They will not be mailed to you; this is taxable income.*
- *To obtain the \$300 deduction for above-the-line charitable contribution (NEW FOR 2020):*
  - *Cannot be property distributions (i.e., Goodwill)*
  - *A receipt is required*
  - *Cannot be through a donor-advised fund.*
- *If the stimulus payments are incorrect on your 2020 tax return, the IRS will hold back your refund and possibly delay your filings. To avoid this, please:*
  - *Provide the amount, date and method of receipt for the first stimulus (EIP) in 2020*
  - *Provide the amount, date and method of receipt for the second stimulus (EIP 2) in 2021.*
- *The IRS has announced the filing season will open on February 12<sup>th</sup> – two weeks later than usual. The filing deadline is unchanged at 4/15 for individuals and 3/15 for partnerships.*

Please utilize the online options available (Canopy for document sharing; DirectPay and the TSC for paying estimates) for your safety and ours. If you will be dropping your tax information, we will be providing a drop-off box outside our new office (visit our site's [home](#) page for a video on finding our front door). The box is monitored and you can call from the parking lot to let us know that you are here. We are always happy to greet you in the parking lot at your car.

We know this is going to be a challenging tax year. We will do our best, as always, to accommodate your needs and make this part of your life as easy and painless as we possibly can.

MJW and Team!