

March 16, 2020

To our clients regarding COVID-19 (Coronavirus):

We wanted to take this opportunity to let you know we are taking all precautions to protect the well-being of our clients and our team members during this unprecedented time.

Everyone's comfort level is different, and our goal is to take the necessary steps to help facilitate the safety of clients and team members. As a result, we wanted to make you aware of a few alternate ways to drop-off and pick-up your tax returns.

CLIENT PORTAL

Rather than stopping by and dropping off your taxes (which you are more than welcome to do that), we also have a secure client portal where your tax documents can be uploaded for our review. We can then prepare your return using the documents and upload the final return back to the portal for your review and signature. If you are interested in this type of tax drop-off, please email Savahna at sscheibe@obregonandassociates.com and she will send you a link and password.

MAIL SLOT ON SIDE DOOR

We also have a mail slot in the door located on Legion Avenue towards the back of the building. If you prefer not to stop in, you are welcome to drop-off your documents on the side door during normal operating hours or after hours. We will then prepare your return and notify you when complete and decide on a way to distribute the completed return to you and retrieve your signed e-file documents.

NEW CLIENTS

For our new clients, we do require a meeting and copy of your driver's license(s), so the two options above will not work. However, our office is equipped with Microsoft Teams and we would be happy to have a brief web meeting to introduce ourselves and go over your tax documents. You can then use our portal to upload the information including copies of your license. Or, you can simply schedule a meeting and we would be happy to meet with you in our office.

STANDARD DROP-OFF

If you are okay with dropping off and/or meeting with Brian for a few minutes, we are okay with that as well. This option is always available. We do have hand sanitizer by the door for your use.

As mentioned above, everyone has different comfort levels regarding the virus and social distancing, and our goal is to make sure you are aware that there are options for dropping off and picking up. It is just a matter of what you are comfortable with.

As always, we appreciate your business and look forward to working with you now and in the future.

Sincerely,
Obregon & Associates