

Since the outbreak of the COVID-19 coronavirus, Harvey & Parmelee has been closely monitoring and responding to the developing situation in order to continue serving and advising all of our clients without interruption.

Above all, the health and safety of our clients, our employees and our communities are our priority.

Harvey & Parmelee has implemented measures across our organization to minimize any disruption as long as possible. **However, as the virus continues to spread and formal statewide recommendations are being made, in an effort to protect our staff and provide them a work environment where they feel safe, effective Tuesday March 17<sup>th</sup> we will be closing both of our offices to all non-employees.** At this time, both offices will continue to have staff working in the office to receive tax documents and answer any questions or concerns you may have.

**In lieu of in-person meetings,** we have the following options available to you:

- upload documentation to our client portal
- mail information into our office or
- drop off your information
  - Whittier will have a locked mail box in the garage of our building next to the other FedEx and Postal mail boxes. Please call the office if you are unable to find the location.
  - San Marino has a mail slot at the front door for which you can just drop your tax information documents through the mail slot. As the office doors will remain locked, your documents will be secure as only Bob and Gabrielle will have access to the office at this time. Feel free to give Gabrielle a call to confirm receipt.

*If you have any questions you would like to discuss with us, please make a note on the organizer packet & we will make sure to reach out to you via phone or email to go over your questions with you prior to finalizing up your tax return.*

**Once we have prepared your returns,** we can:

- **upload** electronic copies of your return to our client portal – Please note that this would be our recommended option at this time as we are not sure how long we will have access to staff physically being in the office or able to mail a paper return to you at this time. Even if we upload an electronic copy to the portal, we can always mail a paper copy to you for your records at a later date. We realize that many of you have not yet setup online portal accounts, so please let us know if you would be open to using the portal at this time and we can provide you detailed instructions on how to download and review your tax returns.
- send paper copies of your returns to you via mail or Fed-ex (as long as we have this ability)
- provide you an estimate of any tax liability owed or confirmation of refund and file an extension

*As always, please email or give us a call with any questions you might have once you have had a chance to review your return and we are happy to assist.*

**Once you have reviewed your returns,** please sign and return the efile forms to us via::

- upload to your client portal
- fax to the Whittier office at 562-698-0428
- mail the paper signed 8879 forms back to Whittier

**As we do not know how long we will be able to keep staff physically in the office to handle paperwork, if you are planning on either dropping off or mailing in your tax documents, we would strongly encourage you to do this sooner than later or we may need to file an extension. The IRS and state tax agencies are working on options for extensions of time to file or pay, but at this point we do not have specific guidelines available. We are trying to still prepare and process as many of our client's tax returns as we can before April 15<sup>th</sup>.**

*We would be happy to discuss your tax questions over the phone or via email and look forward to resuming in person visits as soon as we can.*

Due to the **expected additional volume of calls** into our phone system, please note the following **additional phone lines** to reach our office:

**562-698-9892**

**562-698-9893**

**562-698-9894**

**562-698-9895**

As you can hopefully understand, we have been spending more time than usual with client communication and implementation of procedures. As such, we ask that you please be patient with us on how quickly we can respond to telephone and email messages and our turn-around time for preparing your returns is taking longer than usual. We are working on everything as quickly as possible. As we learn more information, we will update you on how it may impact the filing season. **We value your trust in our firm as we continue to support you through some of the uncertainties of this tax season.**

Sincerely,

The partners and staff of Harvey & Parmelee LLP