



Krystopher Ziolkowski, EA

*Individuals, All States,  
Trust & Estates, Small Business*

A-Zed Taxes LLC

**East**  
9170 E. Bahia Dr, Ste 102  
Scottsdale, AZ 85260

**West**  
9949 W. Bell Rd, Ste 202  
Sun City, AZ 85351

## Dear New and Returning Clients of A-Zed Taxes,

Welcome to another upcoming tax season! Please take a moment to review this letter, attached worksheets, and your personalized client organizer for 2020.

### Update on Appointments

For this upcoming tax season, we are changing how we conduct office visits. Please review the following information:

- **All office appointments will be considered a drop-off/pick-up (15 min max).**
- **If your situation is relatively the same as last year, we are asking that you email, mail, or ask us about using Secure File Pro to share files and provide signatures.**
- If you had an appointment last year between Jan – April 15<sup>th</sup>, we have scheduled you a drop off appointment time like we have done in the past. **Your appointment time/date are on page 1 of your Client Organizer marked and highlighted.**
- We are asking that you wear a mask when in the office. We also ask that if you traveled, felt ill, or visited a medical facility in the past 48 hours to abstain from coming in.
- **Fill out your organizer and the attached worksheet(s) to the best of your ability.**

**If you are a new client and/or do not have an appointment listed on your organizer, please contact us.** Below is a guide on when you should have all your documents to us.

February 15<sup>th</sup>: W2 income, pensions, and rentals

March 1<sup>st</sup>: Business owners of S Corps, Partnerships, and C Corps

March 15<sup>th</sup>: Brokerage Accts (capital gains, dividends), Trusts

April 1<sup>st</sup>: K1s, Royalties, and other tax oddities with delayed reporting

### Krys's Schedule for this Season

Monday and Wednesday: West Office

Tuesday and Thursday: East Office

Fridays and Saturdays: Depending upon appointments (call for details)

**Tax Law Update:** To address tax law changes, the CARES Act, and SECURE Act, we are asking that you fill out the following worksheets to the best of your ability.

We are here to help you put a bookend to what has been a crazy year. We look forward to working with you. Please contact us if you have any questions.

Sincerely,

Krystopher Ziolkowski, EA

Robert Szekalski, AFSP



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Client Name: \_\_\_\_\_

**Best way to contact you:**

\_\_\_\_ Email: \_\_\_\_\_

\_\_\_\_ Phone: \_\_\_\_\_

**How would you like your final copy of the return sent to you:**

\_\_\_\_ Paper – Pick up

\_\_\_\_ Paper – Mail

\_\_\_\_ PDF – Email

\_\_\_\_ PDF – Secure File Pro

**Stimulus Payments:**

Did you receive an economic stimulus check in 2020? \_\_\_\_\_ Y \_\_\_\_\_ N

If so, how much did you receive? \_\_\_\_\_

**Charitable Contributions:**

Cash/Checks (do not include payments used for AZ Tax Credits): \_\_\_\_\_

Non-Cash (clothes, furniture, household items): \_\_\_\_\_

**Retirement Accounts:**

Did you take a distribution from your IRA or 401k in 2020? \_\_\_\_\_ Y \_\_\_\_\_ N

If yes, were you financially impacted by Covid-19? \_\_\_\_\_ Y \_\_\_\_\_ N

If you are over 72 years old, did you take your required minimum distribution? \_\_\_\_\_ Y \_\_\_\_\_ N

**Tax Planning:**

If it would lower your tax liability for the year, would you be willing to contribute to an IRA, 401k, or SEP? \_\_\_\_\_ Y \_\_\_\_\_ N

If so, how much would you like to contribute (IRA max \$6,000 or if over 50, \$7,000, 401k \$19,500 or \$26,000 if over 50): \_\_\_\_\_

In lieu of paying AZ tax, would you like to contribute to AZ charities a.k.a. **AZ Tax Credits (see worksheet)?** \_\_\_\_\_ Y \_\_\_\_\_ N