

Important Notice: The IRS will **NEVER** call, text or email you. Should you receive a letter via the US mail, simply upload it to the portal or scan it and e-mail to us.

Welcome to the 2021 Tax Season! We hope you and your family are safe and healthy this tax season. Please note our [website](#) has been updated with a wealth of information, including links to the [SecureFile Pro Portal](#), [IRS](#), state agencies and the [CDC](#).

We continue to take every precaution to care for our clients and associates in protecting their health. Ed O'Neill Ltd continues a modified appointment process. If requested, once we receive **all** documents we will contact you to set-up your scheduled time to meet with Ed via Zoom or teleconference. We will make every effort to accommodate your request. Please see our [Covid-19 Appointment policy](#) in this newsletter for details.

More and more of our clients are taking advantage of our [SecureFilePro Portal](#). It's secure, quick and simple to use. Call Ed O'Neill at 516.935.7771 to request your SecureFilePro Link access.

Kindly note:

- The [SecureFilePro Portal](#) is the most efficient and safest method to process your [Tax Documents](#). The next best method is to clearly scan all documents to one .pdf, if possible, and email all [tax documents](#) to Office@EdONeillTaxes.info.
- Place phone numbers and email addresses on **all** [tax documents](#) sent via US Postal Service, Fed Ex, UPS, fax or dropped off in our lock box at our office in Westbury.
- All Direct Deposit information must be confirmed with a voided check **each year**.
- Please do not fax State IDs such as driver's licenses. The poor quality makes it illegible to process.
- In addition to **stimulus checks** please provide total amounts received for **child tax credit** (if applicable).

Reminders:

- ☐ Please visit our website at www.edoneilltaxes.com for a full [checklist of documents](#) required to process your tax return and [sample documents](#).
- ☐ Once your tax returns are complete - All E-file Signature pages are signed and returned to us with payment (we accept most major debit and credit cards) - our office will E-file your tax returns with the IRS and State (if needed). Please note: you are responsible to pay the IRS or state if monies are owed.

We sincerely appreciate your patience and understanding during tax season.

We value your business. Thank you for your confidence with Ed O'Neill Ltd.

Many happy returns,

Ed

Office of Ed O'Neill Ltd.



Dos and Don'ts to Preparing Your Taxes:

- ☐ Do submit **all** information needed to complete your tax return by [SecureFile Pro portal](#), email, mail-in, fax, or drop-off. Omission of pertinent information may cause delays in processing or an incomplete tax filing. It may also result in refund delay and/or IRS or state audit. Please see our website at <http://www.EdONeillTaxes.com> for a checklist of required documents and [sample documents](#).
- ☐ Do provide a current, clear and legible copy of [State Issued Identification](#) (such as a state issued driver's license-both *front and back*) for Taxpayer and Spouse (if applicable).
- **Don't** fax your state issued identification as the poor quality makes it illegible to process. This is required every year.
- ☐ Do submit Form [1098T](#), tuition bills or a transcript from the Bursar's Office in order to qualify for the **college tuition credit**.
- ☐ Do submit a voided check, required each year, in order for you to receive a refund direct deposited in a specified account
- ☐ Do complete the pertinent documents in this newsletter and submit them with all your tax documents. We must receive the [signed Letter of Engagement](#) and completed client information form in order for us to prepare your tax return or visit our website at www.edoneilltaxes.com to download the required documents
- ☐ Do advise us of any change of address, any change in marital status (Single, Newlywed, Separation, Widow or Divorce.) any change of dependents (New Baby or a Child claiming themselves). If you had a baby in 2021, Congratulations! Please submit the baby's name, social security number and date of birth.
- **Don't** cut documents. This will only delay the process.
- **Don't** staple documents. This will only delay the process.
- ☐ Do feel free to provide clear and legible copies. Originals are not necessary.
- ☐ Do clear your voicemail box so that we may leave a message if necessary.
- ☐ Do scan to one .PDF, if possible, when submitting documents via email or [SecureFilePro portal](#).

Appointments

If requested, once we receive **all** documents we will contact you to set-up your scheduled time to meet with Ed via Zoom or teleconference. We will make every effort to accommodate your request. Please see our updated [Covid-19 Appointment Policy](#) in this newsletter.

Over→



Face covering is mandatory in the office, no exceptions!

In an effort to keep our clients and associates safe, Ed O'Neill Taxes Ltd has modified its appointment process.

- ❖ Phone appointments are always available.
- ❖ Virtual appointments through zoom are available.
- ❖ In-Person appointments will be limited to 15 minutes per client, after taxes documents have been received, and will be of limited availability.

To minimize any risk of compromising anyone's health, please submit all tax documents using one of our convenient methods:



SecureFile Pro Portal – If you need an account, simply email us at Office@EdONeillTaxes.info requesting access and we will email you a link for you to establish an account.



Email – Office@edoneilltaxes.info



United States Postal Service



UPS



Federal Express



Fax – 516.822.6704 (Please do not fax State IDs such as driver's licenses. The poor quality makes it illegible to process). Feel free to use one of our other document submission methods

- ❖ **If needed, once your return is complete we will contact you to set-up your scheduled time with Ed.**

As a matter of courtesy and precaution, if you have a cough, fever, cold or any flu-like symptoms, please do not arrive at the office for any reason. We will do everything in our means to make sure your taxes will be prepared in a timely manner.

We look forward to serving you and hope this tax season brings you good health and happy returns.

Sincerely,

Ed

Office of Ed O'Neill Ltd.



Client Information Sheet

Please help us better serve you. Kindly complete and return to the receptionist. Thank you!

Name(s) on Tax Return _____ Spouse _____

Street Address _____ Apt # _____

City, State, Zip _____

Daytime Phone _____ Spouse Daytime Phone _____

Evening Phone _____ Spouse Evening Phone _____

Cell Phone _____ Spouse Cell Phone _____

Date of Birth _____ Spouse's Date of Birth _____

Occupation _____ Spouse's occupation _____

Email Address _____ Spouse's Email Address _____
(required for E-Filing)

Have you moved in the last year? NO YES

Are there any new dependents? NO YES

Are there any dependents you are no longer claiming? NO YES

Did you receive a stimulus check NO YES

If Yes, how much \$ _____ \$ _____

Did you receive any child tax credit? NO YES

If Yes, please provide total amount for 2021 \$ _____

	Primary		Spouse	
Did you collect NYS unemployment in 2021?	NO	YES	NO	YES
Have you traded any cyber currencies?	NO	YES	NO	YES
Have you (or an entity of which you are an owner) been convicted of an offense, defined in New York State Penal Law Article 200 or 496, or section 195.20? (REQUIRED FOR NY IT-201/203-ATT FILERS)	NO	YES	NO	YES

Would you be interested in being contacted by our Financial Advisor, Ed O'Neill Jr. regarding a post-tax season financial review?..... NO YES

How would you like your tax return sent to you when completed? *Portal / E-mail / Mail*

How would you like to meet with Ed? Zoom / Teleconference / In-person / No meeting necessary

Availability for In-Person meetings will be limited

Kindly submit this document with a copy of a **voided check, clear copy of the front and back of your driver's license and your spouse's driver's license and the Letter of Engagement**



Subject: Preparation of Your 2021 Tax Returns

Ed O'Neill's Letter of Engagement

Dear Client:

Thank you for choosing Ed O'Neill Ltd. to assist you with your 2021 taxes. This letter confirms the terms of our engagement with you and outlines the nature and extent of the services we will provide.

We will prepare your 2021 federal and state income tax returns. We will depend on you to provide the information we need to prepare complete and accurate returns. We may ask you to clarify some items but will not audit or otherwise verify the data you submit. An Organizer will be provided, if needed, to help you collect the data required for your return. Please notify us if an Organizer is needed, and we will promptly email it to you.

We will perform accounting services only as needed to prepare your tax returns. Our work will not include procedures to find defalcations or other irregularities. Accordingly, our engagement should not be relied upon to disclose errors, fraud, or other illegal acts, though it may be necessary for you to clarify some of the information you submit. We will, inform you of any material errors, fraud, or other illegal acts we discover.

The law imposes penalties when taxpayers underestimate their tax liability. Please call us if you have concerns about such penalties.

Should we encounter instances of unclear tax law, or of potential conflicts in the interpretation of the law, we will outline the reasonable courses of action and the risks and consequences of each. We will ultimately adopt, on your behalf, the alternative you select.

Our fee will be based on the forms required at standard billing rates plus out-of-pocket expenses. Invoices are due and payable upon presentation. To the extent permitted by state law, an interest charge may be added to all accounts not paid within thirty (30) days.

Our engagement to prepare your 2021 tax returns will conclude with the delivery of the completed returns to you (if paper filing) or your signing, and the subsequent submittal, of your tax return (if e-filing). If you have not selected to e-file your returns with our office, you will be solely responsible to file the returns with the appropriate taxing authorities. Review all tax-return documents carefully before signing them.

To affirm that this letter correctly summarizes your understanding of the arrangements for this work, please sign in the space indicated below and return to us.

We appreciate your confidence in us. Please call if you have questions.

Sincerely,
Edward O'Neill

(Both spouses must sign for preparation of joint returns.)

Accepted by:

Taxpayer

Spouse

Please clearly print name – Tax payer

Please clearly print name – Spouse

Date:



CONSENT TO DISCLOSURE OF TAX RETURN INFORMATION

Federal law requires this consent form be provided to you. Unless authorized by law, we cannot disclose your tax return information to third parties for purposes other than the preparation and filing of your tax return without your consent. If you consent to the disclosure of your tax return information, Federal law may not protect your tax return information from further use or distribution.

You are not required to complete this form to engage our tax return preparation services. If we obtain your signature on this form by conditioning our tax return preparation services on your consent, your consent will not be valid. If you agree to the disclosure of your tax return information, your consent is valid for the amount of time that you specify. If you do not specify the duration of your consent, your consent is valid for one year from the date of signature.

You have indicated that you are interested in obtaining information on retirement plans such as an IRA, SEP, or Roth IRA, purchase or sale of investments, managed funds accounts, and/or other advice concerning your financial investments. To provide you with this information, Ed O'Neill Ltd. must disclose your tax return information, as indicated below to EON Wealth Management.

If you would like Ed O'Neill Ltd. to disclose your tax return information to EON Wealth Management, please check the corresponding box for the service in which you are interested, provide the information requested below, and sign and date your consent to disclosure of your tax return information.

I authorize Ed O'Neill Ltd. to disclose to EON Wealth Management that portion of my tax return information for 2021 and future tax returns that is necessary for EON Wealth Management to contact me.

If you approve use of your tax return information by Ed O'Neill Ltd. for a term of one year or (duration of consent) _____ years, please sign below.

Signature: _____

Print name: _____ Date: _____

If you believe your tax return information has been disclosed or used improperly in a manner unauthorized by law or without your permission, you may contact the Treasury Inspector General for Tax Administration (TIGTA) by telephone at 1-800-366-4484, or by email at complaints@tigta.treas.gov



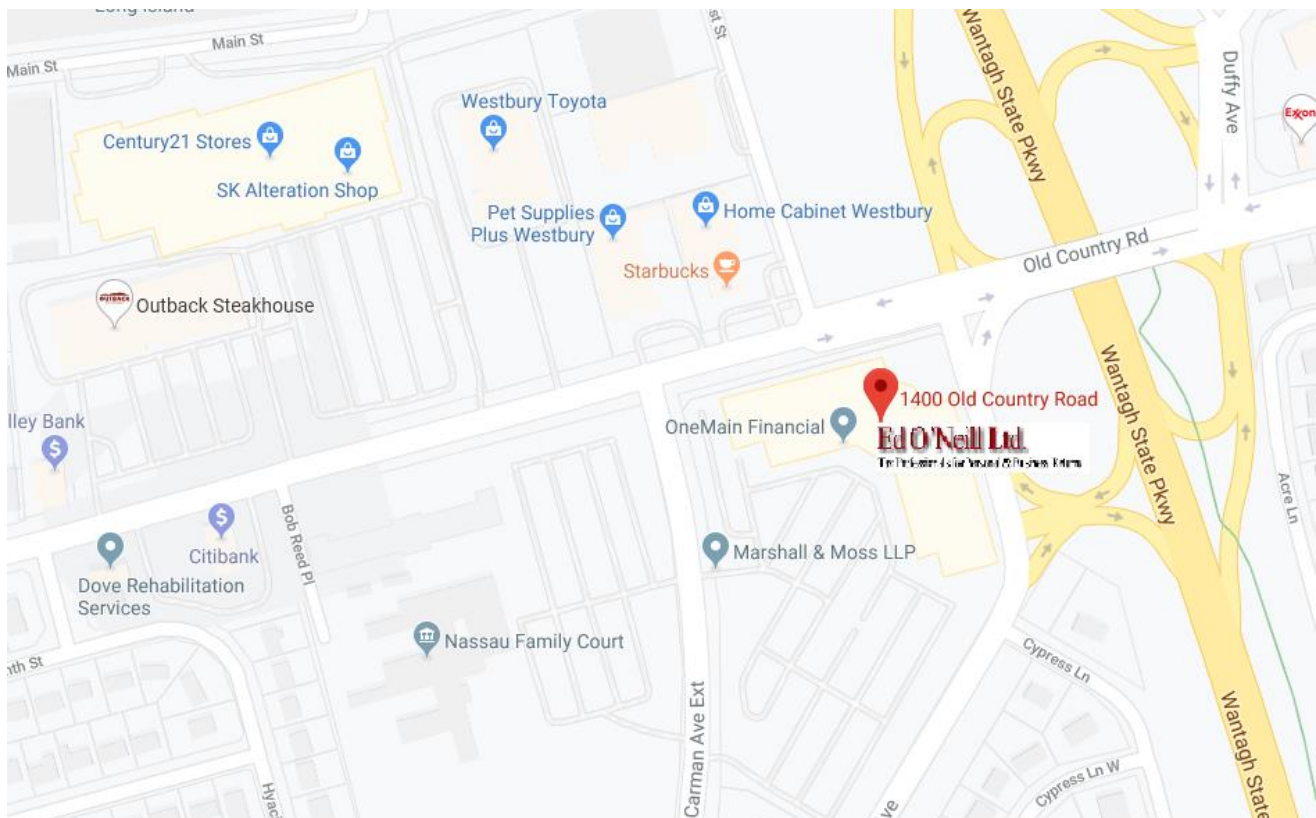
Directions to Ed O'Neill's Office

1400 Old Country Road
Suite 303
Westbury, NY 11590
516.935.7771

When using GPS please use Carmen Avenue Extension

From the Northern State Parkway - Northern State to the Wantagh Parkway South to exit W2 West (Old Country Road). At the 2nd traffic light make a left turn (Carmen Avenue Extension). Make 1st left turn into the first parking lot entrance.

From the Southern State Parkway - Southern State to the Wantagh Parkway North to exit W2 West (Old Country Road). Stay right on the exit ramp. Merge onto Old Country Road. At the 2nd traffic light make a left turn (Carmen Avenue Extension). Make 1st left turn into the first parking lot entrance.



1400 Old Country Road, Suite 303, Westbury, NY 11590

www.EdONeillTaxes.com

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