

2021 Tax Information

JANUARY 20, 2022 | BY: THE TAX TEAM



We hope this email finds you well. Your 2021 Individual Tax Questionnaire is now available on the ShareFile portal. You should have received a notification from Sharefile, noreply@sf-notifications.com. If you don't see the email in your inbox, please check your spam folder. If you have opted into using TaxCaddy, your information will be available on the app instead.

You can send along your documents to us electronically via the ShareFile portal as well.

So that we can provide all of our clients with quality service, we will need your tax information by Monday, March 21st. Otherwise, we will need to place your return on extension. Please be aware that you will still need to pay the estimated balance of your 2021 tax which is due by April 15th. Please reach out to a member of your client service team with any questions.

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