

# **Mark Young CPA**

## **Tax Season FAQ**

**Q - I'm not great with technology, do I have to use the online Portal?**

A – No, you do not have to use the online portal to send us your tax information. It is fine to mail or drop off your tax information in advance of your review meeting. We recommend that if you mail us your tax information, you make a copy first.

If you wish us to mail a paper organizer to you because you don't have a printer, email us and we will send your organizer out to you right away.

**Q - In the SmartVault Portal, what do TY20 and TY21 stand for?**

A – TY20 and TY21 stand for "Tax Year 2020" and "Tax Year 2021." You will be using TY21 for this year since that is the return we are going to prepare.

**Q – I see three folders under TY21 – How are they used?**

TY21\Client Organizer – This is where I will upload your organizer. Please print this out and use this to gather your tax information.

TY21\Client Source Documents – This is where you will upload your tax documents if you send us your tax documents via the portal. Once you have uploaded ALL your tax documents,

please send us an email so we know we can start on your return.

TY21\Client Tax returns – This is where I will post the completed copy of your return when it is done.

**Q - What should I do if I can't get my information to you a week before the appointment date?**

A - Just reschedule your appointment using the original appointment confirmation email we sent you. There is a "reschedule" link at the bottom confirmation email you will receive from Calendly (our appointment software).

As a benefit of having shorter appointments this year, we have much more room on the schedule, making it very easy for you to find a time that works best for you.