

# **SCHUMAN SIMON & GRODECKI, LTD.**

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**CERTIFIED PUBLIC ACCOUNTANTS**

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IRWIN NEWMAN (1920-1964)  
ALVIN W. SCHUMAN, C.P.A., J.D. (1956-2011)

## 2020 Tax Year

Dear Schuman Simon & Grodecki LTD Client:

This letter is to confirm and specify the terms of our engagement with you and to clarify the nature and extent of the services we will provide. In order to ensure an understanding of our mutual responsibilities, we ask all clients for whom returns are prepared to confirm the following arrangements.

We will prepare your 2020 federal and requested state income tax returns from information that you will furnish us. We will not audit or otherwise verify the data you submit, although it may be necessary to ask you for clarification of some of the information. We will furnish you with questionnaires and/or worksheets to guide you in gathering the necessary information. Your use of such forms will assist in keeping the fee to a minimum.

It is your responsibility to provide all the information required for the preparation of complete and accurate returns. You should retain all the documents, canceled checks and other data that form the basis of income and deductions. These may be necessary to prove the accuracy and completeness of the returns to a taxing authority. You have the final responsibility for the income tax returns and, therefore, you should review them carefully before you sign them.

Our work in connection with the preparation of your income tax returns does not include any procedures designed to discover defalcations or other irregularities, should any exist. We will render such accounting and bookkeeping assistance as determined to be necessary for preparation of the income tax returns.

We will use professional judgment in resolving questions where the tax law is unclear, or where there may be conflicts between the taxing authorities' interpretations of the law and other supportable positions. Unless otherwise instructed by you, we will resolve such questions in your favor whenever possible.

The law provides various penalties that may be imposed when taxpayers understate their tax liability. If you would like information on the amount or the circumstances of these penalties, please contact us.

We are also available for tax planning services. Certain communications involving tax advice between you and our firm may be privileged and not subject to disclosure to the IRS. By disclosing the contents of those communications to anyone, or by turning over information about those communications to the government, you may be waiving this privilege. To protect your rights, please consult with us or your attorney prior to disclosing any information about our tax advice.

Your return may be selected for review by the taxing authorities. Any proposed adjustments by the examining agent are subject to certain rights and appeals. In the event of such government tax examination, we will be available upon request to represent you and will render additional invoices for the time and expenses incurred.

Our fee for these services will be based upon the amount of time required at standard billing rates plus out-of-pocket expenses. All invoices are due and payable upon presentation.

In accordance with our Firm's current document retention policy, we will retain copies of the records you have supplied us along with our workpapers for your engagement for a period of 7 years. All of your original records will be returned to you. After 7 years, the tax organizer, our work papers and any other files related to preparing your return will no longer be available. Physical deterioration or catastrophic events may shorten the time during which our records will be available. The working papers and files of our Firm are not a substitute for your original records.

If the foregoing fairly sets forth your understanding, please sign the enclosed copy of this letter in the space indicated and return it to our office. However, if there are other tax returns you expect us to prepare, such as gift and/or property, please inform us by noting so at the end of the return copy of this letter.

In order to provide you with excellent service and to allow us to prepare and deliver your tax return before the April 15th deadline, we ask that you provide us with all of your available tax information no later than March 25, 2021.

We want to express our appreciation for this opportunity to work with you. Please visit our website at <https://www.ssgltd.com> for additional information related to tax and accounting.

Sincerely,

*Schuman Simon & Grudecki, Ltd.*

I (we) have submitted this information for the sole purpose of preparing my (our) tax return(s). Each item can be substantiated by receipts, canceled checks, or other documents. This information is true, correct, and complete to the best of my (our) knowledge.

\_\_\_\_\_  
Taxpayer Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Spouse Signature

\_\_\_\_\_  
Date

Home Phone: (\_\_\_\_\_) \_\_\_\_\_

FAX Number: (\_\_\_\_\_) \_\_\_\_\_

Taxpayer's Business Phone: (\_\_\_\_\_) \_\_\_\_\_

Taxpayer's E Mail Address: \_\_\_\_\_



Schuman, Simon, & Grodecki, Ltd.

## SS+G Ltd Collaboration, Technology & Security Update

SS+G Ltd is using software technologies to help clients increase efficiency, stay connected and informed while maintaining security and social distancing recommendations. Every client has the capability to utilize the below technologies to adhere to recommended safety and security measures. As we remain distanced, electronic documents, signatures and transfers are becoming more popular. By utilizing SS+G Ltd implemented technologies we can all remain safe and secure. With cyber-crime at an all-time high, the unreliability of U.S. mail, and reduced person-person contact due to Covid-19 we encourage clients to use these technologies. All these technologies can be used on all platforms or individually on a web browser, desktop app, cell phone app.

Please email [jmg@ssgltld.com](mailto:jmg@ssgltld.com) for more information on any of the below integrations or to be added.

### **Adobe PDF's – (PDF copies all available in our shared Dropbox)**

#### **Formed PDF (able to type in boxes), Electronic Signatures, Searchable PDF, Password Protection**

Allows clients to view all their files, go paperless, sign documents, and type in PDFs.



Tax Organizers

E-file Authorizations

Tax Returns

Tax Information

Fill out your tax organizer digitally. You are able to type in boxes.

Able to sign digitally. (Most clients print, sign and re-upload)

Past 7 years of tax returns all digitally located in Dropbox.

SS+G Ltd makes all documents searchable by keyword.

### **Constant Contact - Email Marketing**



SS+Gs Ltd keeps Clients up to date with News and Alerts Via Email.

Due Dates, Planning, Reminders, Tax Matters, Updates

### **Dropbox - Secure Encrypted File Transfers and Paperless Document Options**



SS+G Ltd continues to use [Dropbox](#), a cloud portal, where files (PDF, Images, Word, Excel, Quickbooks, etc.) such as tax information & returns can be stored, downloaded or uploaded.

SS+G Ltd encourages clients to use Dropbox (opposed to email) to securely store documents as electronic documents become more popular. Additionally, Dropbox can relieve the concerns of the unreliability of U.S. mail and reduce person-person contact due to Covid-19.

Dropbox allows permanent secure encrypted storage to view/download/upload between SS+G and clients. There are easy ways (click on a link) to access/send your files with and without having a Dropbox account.

Whether you feel comfortable going completely paperless or want both paper copies and electronic copies, SS+G is making it easy for you to have secure access to all your files. See attached sheet for more details.

### **HelloSign – Electronic Signatures - NO SIGN UP OR ACCOUNT NEEDED!**



Sign your tax documents quickly and easily with legally binding signatures.

Draw, Type or Upload a photo of your signature to sign a document!

This can be done on a computer, smartphone or tablet.

### **Zelle – Electronic Payments**



Based on the growing use and popularity of electronic payments, SS+G Ltd is now accepting electronic payment processing from [Zelle](#). All major U.S. banks have in-app integrations with Zelle with NO additional registration required other than to “opt in”. SS+G Ltd Recipient ID for Zelle Payment [jmg@ssgltld.com](mailto:jmg@ssgltld.com) "JMG@SSGLTD(dot)COM"

### **Zoom – Electronic Conferencing**



[Zoom](#) is a web-based video conferencing tool with a local, desktop client and a mobile app that allows users to meet online, with or without video.

Face to Face conferences are possible using your cell phone, laptop or webcam.

Please contact your SS+G representative to setup a meeting.



## **INTRODUCING DROPBOX TO SEND & RECEIVE SAFE ENCRYPTED FILES!**

**Hundreds of our clients are using Dropbox to go paperless  
while keeping confidential information secure.**

**Do not be intimidated! Dropbox is simple, easy and secure  
even without creating a Dropbox account!**

[SS+G introduces Dropbox](#), a client portal, where files (PDF, Images, Word, Excel, etc) such as tax information & returns can be transferred and saved for permanent seam-less delivery. Over 500 million people around the world rely on Dropbox for encrypted secure file storage.

Simply create a free Dropbox account (up to 2 gigabytes storage is free and you choose your password) and notify SS+G that you would like to participate and we will create a shared folder that can display your past tax returns, tax information or any other files you might need. This is a “2-way system” so you will be able to send us files encrypted as well by placing files in your Dropbox. Clients may choose this as a safe electronic alternative to paper returns or emailing sensitive files while having access to their files at all times.

If you would like a personal Dropbox setup for your prior and/or future tax files, email Jon Grodecki at [jmg@ssgltd.com](mailto:jmg@ssgltd.com). Create a free Dropbox account and notify us of your email address associated with your account. You will receive an invitation to your Dropbox from us.

At your discretion, we are able to add other individuals' access to the box or share a link to a single file(s). A fantastic way to share your tax returns or distribute K-1's electronically with family member(s), financial representative, or anyone else who might need secure access to a file.

### **DO NOT NEED A DROPBOX ACCOUNT - OPTIONS TO TRANSFER FILES SECURELY**

Dropbox links via email – If we send you an encrypted file via a Dropbox link, you DO NOT need a Dropbox account to access the links and download your files. Simply click on the link and you can view/download the PDF's. The link will be password protected (last 4 of your social, unless you state otherwise). The password can be changed per your request. I can invite you to join the boxes if you want permanent future access to the files (this requires you to sign-up for a free Dropbox account).

Dropbox uploads via web browser - If we send you a Dropbox uploaded request, you DO NOT need a Dropbox account to upload your files! Email Jon Grodecki at [jmg@ssgltd.com](mailto:jmg@ssgltd.com) and we will send you an upload link. Simply click on the link and drag any files onto the web browser screen and we will receive them on our side secure and encrypted!

For more information please visit....

[Dropbox Self-Learning Tutorials](#)

[SS+G Website Dropbox Page](#)