

# THOMAS & COMPANY

CERTIFIED PUBLIC ACCOUNTANT

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1850 Hamilton Ave  
San Jose, CA 95125  
(408) 559-7444

January 29, 2021

**Dear Valued Client,**

I want to begin by saying thank you.

For twenty-seven years Thomas & Company has operated with a singular mission: to treat our clients like family and provide them with the best client experience available. At the end of the day, it's our clients that make us great, and we wouldn't be where we are today if it wasn't for you.

It goes without saying that this past year has been a trying one for us all. COVID-19 continues to impact the way we all live and work. This tax season, for the safety of all concerned we will be conducting all appointments remotely (See options below). **Further, increased data security concerns and requirements have prompted us to convert our tax return transmission and e-filing process to a fully digitalized format whenever possible. We are moving these processes to online using the E-Signature integrated DocuSign system, which allows you to review and digitally sign the tax returns from your computer or mobile device.** In addition to the e-signature platform, we are strongly recommending all income tax payments and refunds be converted to direct deposit/payment. This will increase data security, expedite your refunds and eliminate the necessity for writing checks and mailing vouchers. The current environment has forced us to adapt as we worry for our families, our businesses, and the state of the world.

With all of this said, I'm pleased to share with you that this year we are implementing the following new options for our clients. It is my hope that these additions will make things a little easier on you this upcoming tax season, and I truly believe they will improve our ability as a firm to deliver the top-level experience that you deserve. The new features that we are rolling out are as follows:

## **Virtual & Phone Appointments**

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The safety of our clients and staff is hugely important to us, so we will be transitioning physical appointments into a remote format. We understand that everyone's comfort level with technology varies, so you will be able to opt to conduct your appointment over the phone or via Zoom.

## **Secure Lockbox**

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For clients who prefer to drop off their documents and payments in person instead of mailing to our office, we've installed a secure physical lockbox at the office. This lockbox will be located by the back door of the Hamilton Ave office (next to back door in parking lot). Similar to a drop box at the post office, clients need only deposit their documents in the opening at the top.

## **E-file and E-Signature with DocuSign**

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As stated before, we will when possible convert our tax return transmission and e-filing process to a fully digitalized format whenever possible. We are moving these processes to online using the E-Signature integrated DocuSign system, which allows you to review and digitally sign the tax returns from your computer or mobile device. In addition to the e-signature platform, we are strongly recommending all income tax payments and refunds be converted to direct deposit/payment. This will increase data security, expedite your refunds and eliminate the necessity for writing checks and mailing vouchers.

## **Secure Online Client Portal- Coming**

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This year we've partnered with AbacusNext to implement a brand-new secure online portal option for our clients. This is still in beta format and thus a work in progress but we hope to be testing it with those interested. If you have interest in testing our new option this year please email [austin@thomasandcompanycpa.com](mailto:austin@thomasandcompanycpa.com) (Austin Thomas). Those who choose to use the new portal in the future will be able to:

- Request and schedule their appointments online through the portal
- Securely upload, download, and e-sign documents from the comfort of their home
- Review their tax returns/other documents from previous years online
- Conveniently view and pay invoices via ACH or Credit Card

As we start transitioning into some of these new features, I want to keep the lines of communication open with you and encourage your feedback throughout this process. Please feel free to reach out and let us know what you like, what you don't like, and what you'd love to see from us in the future as we continue to adapt. An email address to do so is listed at the bottom of this letter.

My team and I are incredibly excited to begin this new chapter, and there's no one we'd rather do it with than you. From my family to yours: stay safe and stay positive. We look forward to continuing to serve you.

Sincerely,

Christopher Thomas

If you have any questions about our new options or any feedback to share, please reach out via email to [info@thomasandcompanycpa.com](mailto:info@thomasandcompanycpa.com) and we'll get back to you as soon as possible.