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Dear Client:

I hope that your holidays were enjoyable and that you are all staying safe through this second wave of COVID-19 cases. Let's hope that 2021 will be a wonderful rebuilding year as well as a very healthy year for us all.

Things have changed dramatically for us all as a result of COVID-19. My business was no exception. My business is deemed essential. I plan to be working at my desk every day during this upcoming tax season. Some of my clients have opted to work remotely with me and some have continued the traditional face to face meeting. **All in person meetings must be by appointment only. Per MA state COVID-19 guidelines, all clients must maintain very strict social distancing and mask protocol during their entire visit.** Those who would like to set up telephone conference calls or video conference calls will need to make sure you either drop off or mail in your income tax questionnaire and backup documents in advance of our call.

My 2020 income tax questionnaire is enclosed in this package. I have tried to simplify the questionnaire, so please take note of the following to minimize your work in compiling your information.

Page 1 – There is no need to provide me with several contact telephone numbers. Please provide me with your best contact number and your current email address.

Page 2 – There is no need to fill in amounts from your W-2. Due to new E-Filing regulations, preparers must include all data (including amounts in box 12 and box 14 for various pre tax deductions and fringe benefits). Therefore, please just list your employer(s) and attach your W-2(s).

Page 3 – If you have multiple stock transactions, there is no need to complete the “Stock and Bond Sales” section. Just attach your brokerage firm 1099 form making sure you include all pages.

