

COVID INFORMATION

Due to COVID still having impacts on the way we all interact and do business; we are trying to keep our services as flexible and accommodating as possible to give you an option you find safe, comfortable & convenient. As a result, Sonrise has put in place the following policy and procedures.

1. We respect everyone's medical privacy and freedom of choice in how they choose to handle COVID. Mask, no mask, vaccine, no vaccine. We kindly ask that all clients be respectful of each other while they are in our facilities. We have adopted this same philosophy for our staff too.
2. We are encouraging clients to use our no contact **Express Return Dropoff Procedure** again this year instead of the more typical face-to-face dropoff or sit-down appointment. Below you will find a step-by-step checklist of how this process works.
3. Another option is an in-person face-to-face **Express Return Interview** with one of our friendly staff. Similar to above, however it gives you that personal interaction you may need or seek. With an efficient review of your documents and checklist completion we will have you on your way in short order. This of course is only available during our business hours. We are still fully staffed with Secretaries Mon-Fri 9am-7pm & Sat 9am-Noon
4. If necessary, we will schedule face-to-face sit-down appointments for those clients that need them due to more involved tax situations/returns or have had significant changes and questions that may exist since their previous year's tax filing.
5. We have partnered with Verifyle, a company that specializes in Secure Encrypted Data Exchange Portals. If you prefer to work on a truly paperless and remote platform this is for you! Upon request-we will send you a simple to follow email invitation to create your personal portal. The portal allows us to easily exchange information, messages, attach or drag & drop documents back and forth with ultimate privacy and security.
6. Also, if necessary, upon request we do have the capabilities to do Zoom Appointments/Meetings for a visual but virtual no-contact tax appointment.
7. We are making every effort to accommodate each client's needs and requirements on whatever platform and in whichever environment they find safe, convenient & suitable, while being respectful of everyone responsible manner. We appreciate your understanding and cooperation in these matters.

Our New & Improved **TAX ORGANIZER** is a great tool to help you gather all the appropriate information and documents you need as well as jog your memory of items you may have otherwise forgotten.

AND GET THIS-we feel so strongly that it plays a key role in a smooth and efficient tax filing that we will reward you with \$20 if you provide us with a fully completed Tax Organizer with your tax papers!

We have done a complete overhaul and redesign of our website to serve you better.

Visit us at SONRISE.TAX ***The Tax Organizer is at the TOP IN RED-how could you miss it?***

Please check out all the worksheets, guides, organizers and links we put at your fingertips on the "MEETING WITH US" & "RESOURCES" pages.

Please let us know what you think or any suggestions you have to make our website or Tax Organizer even better and more user friendly!

Thank You for the trust you place in Sonrise!