

Safety Measures for 2020 Tax Season

Our office is open! For your safety in response to the COVID-19 outbreak, we have implemented preventative measures while maintaining high-quality service to our clients.

Getting information to us:

- We encourage you to upload your tax documents via our secure client portal.
- Consider US mail, UPS or FedEx instead of in person drop off.
- We will have a new secure drop box available 24/7 at our main entrance if you must drop off. This dropbox is limited in size so for larger packages, we will have a drop off bin during regular business hours that is monitored and emptied throughout the day.

Receiving information from us:

- We will be sending all completed tax returns to our clients via our secure portal and/or UPS.
- Signature request for engagement letters, eFile forms and 1099s will be sent via DocuSign for electronic signature.
- Please notify us for special requests.

Visiting GMS Surgent:

- We encourage our clients to consider telephone conferences or Zoom/Teams in lieu of an in-person meeting. If an in-person meeting is required, please schedule the meeting in advance and wear a comfortable mask as Pennsylvania requires that face coverings be worn when indoors, irrespective of physical distance.
- For scheduled meetings, upon your arrival please contact the person you'll be meeting with by phone. They will greet you at the main entrance and escort you to your meeting space.
 - All visitors must wear a mask throughout the building and keep social distance.
 - If you, or someone in your household, has exhibited symptoms connected with Covid-19 please reschedule your meeting.

The health and safety of our clients and the GMS Surgent team is our primary concern. We appreciate your support, understanding and cooperation with these procedures. If you have never used the client portal, our admin staff would be happy to walk you through the process, just give us a call.

About Us

GMS Surgent is a mid-sized, full service, certified public accounting and advisory firm serving business and individual clients located primarily in (but not limited to) the Greater Philadelphia area. We warmly invite you to click around our website to learn a little more about our firm, our clients and the ways in which our services could benefit you.

"Personal Attention – Valuable Results", is the principal component of our mission statement. It highlights the GMS Surgent commitment to forging strong relationships and ensuring constructive communication while earning consistently effective results for our clients. It plays an essential role throughout every aspect of our firm, guides our actions and acts as a benchmark for the services we provide.

This information is of a general nature. It may omit many details and special rules and is current only as of its published date. Please contact us for more information and how it pertains to your specific tax or financial situation.