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*"Where client's funds are
more than just numbers."*

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2020 Client Tax Letter

COVID CHANGES. Due to the continual health and safety issues surrounding the pandemic, the following procedures and enhancements are being added this year.

1. Those entering the building must wear a mask pursuant to Orange County Building Code access rules.
2. Clients wishing to e-mail documents may utilize our new **Client Portal** which provides better encryption than on-line e-mail transmissions. Utilizing this Portal will permit clients to scan and post numerous documents to us in a secure client folder. If you wish to utilize this feature, please contact us so we can set you up.
3. As a courtesy and convenience to our clients, we can **accept credit or debit card** payments for services. The card feature includes Mastercard, Visa, Discover, and American Express. If you wish to utilize this feature, please call us so we can process your payment.
4. To combat identity theft, tax returns will be e-mailed when possible, otherwise a paper copy with your documents will be provided.

INVESTORS. Be aware the first 1099 representing total dividends/interest or capital gains may not be final. Investment firms are permitted to correct 1099-B forms through April. Please be aware of this when scheduling your appointment, as I will be discussing a proper filing date with you.

ORGANIZER. Clients wishing a 2020 tax organizer may request one by contacting our office or e-mail receptionist@mfmfinancial.com. Clients who have utilized organizers last year will automatically receive one.

APPOINTMENTS. Appointments are available during the day, evening, and on Saturdays. Evening appointments are available Monday through Thursday. You can schedule appointments by phone or via e-mail at receptionist@mfmfinancial.com. If you are elderly or have any physical impairment rendering you unable to come to our office, please let us know, and we will make special arrangements. Voice Messages can be left 24 hours a day. Documents can be e-mailed utilizing our secure **Client Portal** (sign-up is necessary) or e-mailed to assistant@mfmfinancial.com. If possible, make your appointment as soon as possible. Once April 1 arrives, returns not already in process cannot be assured completion by April 15 without the possibility of an extension incurring an additional charge.

MAILING IN DOCUMENTS. If you are mailing in your information, please include an e-mail address if you have one. When we receive your packet, we will confirm via postcard, telephone, or e-mail the receipt of your documents.

PARKING. Our location has adequate free parking. In addition, the adjacent 1320 Building parking lot can also be used. Enter through the front double doors; our office is the first one on the right.

ADDITIONAL INFORMATION can be found on our website including tax information, fees, Privacy Policy and more.

Let's all get through this in a safe and healthy way.

- John & Staff

MFM Financial

Dedicated to the financial well-being of our clients in the 21st century