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27 McKrell Road
P.O. Box 125
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724-265-2222
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January 2025

ADDITIONAL INFO

Options for Tax Preparation:

1. **Appointment** – a two 20-minute appointment format with either Bill or Kim at our Russellton location only.
 - The first 20-minute appointment will be a sit down for questions, discussion, and to see if there are any documents you may be missing. NOTE: the return will **NOT** be completed in front of you
 - The second 20-minute appointment will be for you to pick up your tax return with the person that prepared it so that you are able to review it with them, sign for the return, and pay for preparation.
2. **Drop off** –stop by any location during business hours to drop off your information with the receptionist (Russellton has an outside drop box too!)
3. **Mail in** –you can mail your information to any office
4. **Digital Drop Box** –email us for a link that lets you safely upload your information electronically

Take Home Return Type

- There are three options for your personal take home return type:
 1. Physical, paper copy,
 2. Personal flash drive, or
 3. Digital copy online through a secure link via Citrix ShareFile (provide email for this option)

Dear New or Prospective Client,

Welcome to the BKY Financial family! We hope you and your family are enjoying the holiday season, and are staying safe and healthy! As you may have heard from whomever referred you, we are a small, brother-sister owned tax and financial business with our main office in Russellton, PA, and two branch offices in Mount Pleasant, PA, and Wintersville, OH. At BKY, we offer tax preparation in addition to numerous other accounting services, and are always open to give advice and answer questions.

For the 2024 tax season, we will offer sit down appointments at our Russellton office **ONLY**, and will accept tax information by drop off at all three locations. If your schedule does not allow for you to make it to the office during our normal hours, you also have the option to mail your information to us at any location; or we can set up a “Digital Drop Box” link so you can upload all of your documents to us electronically. If you would like to use the “Digital Drop Box” please let the specific office know at their respective email and we will send over a link!

How much is tax prep and what does it include? Due to everyone being in different tax situations, prices tend to vary case by case depending on what your return entails. With that being said, your tax preparer will determine the final price and can let you know once finished. **Payment for services must be received prior to submission of the return.** We prepare federal, state, and local returns, as well as, PA-1000s if eligible, estimated payment vouchers if requested or deemed necessary, and amended returns if needed.

If you would like to schedule an appointment, ask questions, or receive any additional information, please feel free to contact us at:

724-547-5753 or infoMP@bkyfinancial.com for the Mt Pleasant Office, 724-265-2222 or info@bkyfinancial.com for the Russellton Office, or 740-264-4185 or infoWINT@bkyfinancial.com for the Wintersville Office

Please read about our process and hours on the reverse side!

Our Process

Once you have chosen how you would like to go about getting your tax returns done with us, we will go through your information, prepare the tax return, and package it to be given back to you. If you choose any way besides an appointment, we will call or email you if we have any questions or if additional information is needed; you may also request us to give you a call if you know you have questions for your preparer.

Upon completion of the returns, we offer two options: (1) the return can be mailed back to you or (2) we can call you to have you come to the office to pick everything up. If you choose to have your packet mailed back to you, we will include our invoice, e-file forms to sign, and a self-addressed envelope so you can send us back your payment and signed forms. Once we receive the forms and payment, your return will be submitted. If there are federal or state payments, local returns, rebates, etc. for you to send in, we will also include those forms with envelopes addressed to the respective collector. We prepare the returns in the order we receive them not by complexity, and our turnaround time is around five weeks once we receive your information. *Please note that the turnaround time could vary depending on any changes the IRS may issue that we are not aware of prior to tax season.*

Deadlines:

- If you are dropping off, you must have your tax information to us by **April 1st to GUARANTEE that your taxes will be done by April 15th**
- If you think you may owe & know/think you may need an extension, you must tell us you want to make a **payment with the extension**

Identity Protection Pin (IP Pin):

- If you have had an "IP Pin" in the past, you **WILL** have one this year and we will need this 6-digit number to complete your return. You should receive a letter in the mail regarding this pin; however, if you do not, you can access the pin at www.irs.gov/get-an-ippin or by calling 1-800-908-4490

Mt Pleasant, PA, Hours beginning January 27, 2024:
Monday/ Wednesday: 8:30am – 7pm,
Tuesday/ Thursday/ Friday: 8:30am – 5pm,
& Saturday: 9am – 1pm

Russellton, PA, Hours beginning January 27, 2024:
Monday – Friday: 9am – 7pm
& Saturday: 9am – 3pm

Appointments Offered at Russellton **ONLY**
Days vary, please call for availability

Wintersville, OH, Hours beginning January 27, 2024:
Monday – Friday: 8:30am – 6pm
& Saturday: 9am – 1pm

If you have questions on what to include for your taxes, we have included a "tax prep check list" that you can refer to. We also ask that you fill out the included "taxpayer worksheet," as it asks important information that we need for filing, such as driver's license information (required for electronic filing), bank information (required if you would like direct deposit for refunds or direct debit for payments), and information specific to tax year 2024. In addition, as a new client, we ask that you provide a copy of your most recent tax return if you have a copy on hand for comparison while we prepare this year's return. If you do not have a copy handy, do not worry! We are excited at the opportunity to work with you and look forward to hearing from you soon!

-Bill, Kim, & Matt