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ARE YOU READY FOR TAX SEASON?

To help you prepare for the upcoming 2024 tax season, we have put together a package to help with the preparation of your 2024 income tax returns. Please take time to look at each document, review information carefully, and complete necessary forms before your visit to our office.

YOUR NEXT STEPS:

1. **Taxpayer Worksheet** (enclosed) – Complete, Sign & Date **(REQUIRED)**
2. **Tax Preparation Checklist** (enclosed) – Review (if needed) & compile your tax documents
3. **Plan your tax preparation “visit”:**
 - a. Drop your information off at the office at your convenience, no appointment necessary
 - b. Mail your information to our office using **BOTH** the street address and PO Box
 - c. Upload your information via Sharefile (please email info@bkyfinancial.com to set up!)
 - d. Schedule an appointment by calling the office at 724-265-2222 or by emailing info@bkyfinancial.com
 - i. See reverse side for **NEW APPOINTMENT FORMAT** details

DROP OFF (IN PERSON, DIGITAL, & BY MAIL) DEADLINE FOR TAX PREPARATION: **MARCH 5th, 2025**

- In attempt to avoid complications brought on by unmet deadlines, our company sets deadlines for ourselves and our clients in order to meet the deadlines set by the governments. We also have to take into consideration the large volume of clients that we deal with; as well as, the possibility of circumstances arising that are out of our control. Due to this, to guarantee that your return is done by April 15th, we ask that you have your information to us by March 5th. (This does NOT apply to appointments)
- Any information dropped off after this date will receive an extension to avoid late filing penalties. If you owed money last year and/or think you may owe this year, we can provide an estimated payment voucher to send in as well to avoid additional penalties and interest.

The Russellton office will be open for tax season hours beginning Monday, January 27th, 2025. We will begin accepting tax return information on this day via drop off service; however, appointments will not begin until the following Monday, February 3rd, 2025. *Please see the reverse side for reminders and additional details before planning your visit.*

Office Hours January 27th, 2025 through Tax Season:

Monday – Friday: 9am – 7pm

Saturday: 9am – 3pm

Sunday: CLOSED

****REMINDERS****

Payment to BKY Financial

- Payment **MUST** be received at the time you pick up your tax return, prior to electronically filing your return. We will hold off on filing your tax return until services are fully paid for.

Take Home Return Type

- Please indicate this preference on the taxpayer worksheet! If a preference is not chosen, we will prepare the return as a paper copy.
- If you chose the flash drive option last year, make sure to bring it back, as we can re-use it for this year's return and you will receive a discount!

Identity Protection Pin (IP Pin)

- If you had an "IP Pin" last year, 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

Additional Information

- Drop off preparation has a **5 week turn-around time** but may vary due to circumstances out of our control
- Individual income tax return pricing for returning clients will remain the same unless there are changes or additions to your return (ex. additional states, new business ventures, property tax rebates, etc.)
- Please include your Driver's License or state issued ID information on the worksheet. This is a requirement for electronic filing and we are **NOT** able to do so without this information.
- If you wish to have your return mailed to you upon completion, there will be a \$10 postal charge added to your invoice.
- **If you are sick by any means, please do not come into the office!** If need be, we can mail your return to you or reschedule appointments

ATTENTION: NEW APPOINTMENT FORMAT

Please take note of the revised appointment format we will be implementing this year. Instead of one 40-minute appointment, you will be scheduled for two 20-minute appointments two weeks apart:

-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 this year

-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.

We greatly appreciate your business and look forward to seeing you soon! If you have any questions, please give us a call at 724-265-2222. Thank you! -Bill & Kim