



In Association with Ossio & Mason, Inc.

BKY UPDATES

Welcome William Marsella!

- This summer, we welcomed William to our staff as our Tax Manager! He is looking forward to working closely with you this tax season. Please feel free to introduce yourself while you are in!

Digital Returns

- You are now able to decide the format of your personal, take-home return! Choose between a PDF flash drive, Citrix Share File upload, or a hard, paper copy. *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 this and you will receive a discount!

Russellton & Mt. Pleasant Offices:

- You can schedule a sit down appointment at the Russellton office or use the drop off services for tax preparation
- Tax preparation at the Mt. Pleasant office will be by drop off only as well
- Specific location hours can be found on Facebook or our website

Continued COVID Protocol

- **If you are sick by any means, please do not come into the office!** We can mail your return back to you if needed

January 2024

Dear Valued Client,

Happy New Year! We hope that you and your family have remained safe and healthy through the holiday season. We would first like to thank you for making our first tax season in Wintersville a successful one! Tax season is never short of speed bumps but we appreciate you for giving us a chance and helping us stay on course. We are definitely looking forward to our second tax season out here and many more to come! As usual, you are welcome to drop off your tax information at your convenience and we will prepare them as they come in. We will call if we have any questions, and will call once finished so you can stop back to pick up the completed return. We will begin accepting information on Monday, January 22, 2024; however, please note that we will not be able to begin filing returns until Monday, January 29, 2024. *Please read the side bar for additional information before planning your visit!*

Wintersville Office Hours beginning January 22, 2024:

Monday - Friday 8:30am-6pm

Saturday 9am-1pm

For **ALL** clients, please complete the enclosed Worksheet and bring it with you for this year's filing. **The worksheet included is for returning clients** (a new client version can be found on our website if you will be referring anyone). Filling this out is **required** as it helps us streamline the preparation process.

A few final pieces of information: Please include your Driver's License or state issued ID information on the worksheet. This is a requirement for electronic filing so we will **NOT** be able to electronically file your return without this information. Payment must be received prior to electronically filing your return. Lastly, there will be a \$10 postal charge for anyone who wishes to have their return mailed to them upon completion.

Please call us with questions and check out our Facebook page or website for more information and details! We look forward to seeing you in the coming months!

-Bill, Kim, & William