

841 W. Main Street  
Mount Pleasant, PA 15666  
724-547-5753  
[infoMP@bkyfinancial.com](mailto:infoMP@bkyfinancial.com)

295 Canton Road  
Wintersville, OH 43953  
740-264-4185  
[infoWINT@bkyfinancial.com](mailto:infoWINT@bkyfinancial.com)

27 McKrell Road  
P.O. Box 125  
Russellton, PA 15076  
724-265-2222  
[info@bkyfinancial.com](mailto:info@bkyfinancial.com)



January 2024

## ADDITIONAL INFO

### Options for Tax Preparation:

1. **Appointment** – a 45-minute-long sit-down meeting with either Bill or Kim at our Russellton location only. Your return will be prepared and you will sign for it. After you leave, your return will go through a check & packaging process before the finished product is given back to you.
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

### Digital Returns

- You are 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.*

### 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 or reschedule appointments

### **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 2023 tax season, we 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 us know at [infoWINT@bkyfinancial.com](mailto:infoWINT@bkyfinancial.com) 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:

740-264-4185 or [infoWINT@bkyfinancial.com](mailto:infoWINT@bkyfinancial.com) for the Wintersville Office

724-265-2222 or [info@bkyfinancial.com](mailto:info@bkyfinancial.com) for the Russellton Office, or 724-547-5753 or [infoMP@bkyfinancial.com](mailto:infoMP@bkyfinancial.com) for the Mt Pleasant Office

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

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## 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.*

### Additional Notes:

- Please call the office for information about turnaround time as this will vary throughout tax season
- 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**
- If you usually make estimates, please let us know so we can prepare them accordingly

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 2023.

We are excited at the opportunity to work with you and look forward to hearing from you!

~ Bill, Kim, & William

Wintersville, OH, Hours beginning January 22, 2024:  
Monday – Friday: 8:30am – 6pm  
& Saturday: 9am – 1pm

Russellton, PA, Hours beginning January 22, 2024:  
Monday – Friday: 9am – 7pm  
& Saturday: 9am – 3pm

Appointments Offered at Russellton **ONLY**:  
Mondays, Tuesdays, Thursdays, & Saturdays

Mt Pleasant, PA, Hours beginning January 22, 2024:  
Monday/ Wednesday: 8:30am – 7pm,  
Tuesday/ Thursday/ Friday: 8:30am – 5pm,  
& Saturday: 9am – 1pm