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January 2025

Welcome Jeremy Wilson, CPA!

*This Fall, we welcomed Jeremy to our staff as our **new tax manager!** Jeremy is a Wintersville local, born and raised in the area. He attended Indian Creek High School (Class of 2002) and received his accounting degree from Franciscan University of Steubenville (Class of 2007).*

Throughout his career, he has gained experience in both public accounting and industry. His areas of industry experience include non-profit, banking, and energy services/logistics. However, a majority of his experience has been in public accounting where he has helped countless small to medium sized businesses with their tax and accounting needs. In both tax and accounting, he enjoys using a more personalized approach listening to client needs and formulating solutions to match those needs.

Jeremy is a CPA licensed in both Ohio and West Virginia. He is also a member of the American Institute of CPAs and the Ohio Society of CPAs.

He is excited to work closely with you all this tax season. We are looking forward to the expertise and personable skills that Jeremy bring to the table. Please feel free to introduce yourself while you are in!

Dear Valued Client,

Happy New Year! We hope that you and your family have remained safe and healthy through the holiday season. 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 27, 2025.

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.

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, & Jeremy*

IMPORTANT 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

- 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!** Other arrangements can always be made.

Russellton & Mt. Pleasant Offices

Both of our other offices offer drop off services for tax preparation. Please contact these offices directly or visit our website for more information, including location specific hours.

Wintersville Office Hours beginning

January 27, 2025:

Monday - Friday 8:30am-6pm

Saturday 9am-1pm

