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January 2026

**NEW IRS UPDATES  
 EFFECTIVE FOR TAX  
 YEAR 2025**

- **Refunds by check will no longer be an option for this year.** It is EXTREMELY IMPORTANT that you confirm your bank account with us EVERY YEAR due to this change
- **Payments by check will no longer be an option this year.** You will be able to (1) use your bank account to set up direct debit when we electronically file your return OR (2) you will be able to pay your balance ONLINE using your bank account/debit card/credit card
- **Overtime and tips** will need to be reported separately and may not be shown properly on your W2. If you work for tips or overtime, please include a copy of your last paystub of 2025 when bringing in your tax information
- Separate from your annual income tax return, **all registered PA business and nonprofits** are now REQUIRED to file a PA Annual Report through [file.dos.pa.gov](http://file.dos.pa.gov) (due dates can be found on our website)

**Dear Valued Client,**

Happy New Year! We hope that you and your family have remained safe and healthy through the holiday season. We would like to thank you all again for continuing on with us and being a part of our success as we prepare for another tax season! As always, please feel free to drop off your tax information at your convenience and we will prepare your returns as they come in. We will call if we have any questions, and will call once finished so you can stop back in to pick up the completed return. We will begin accepting information on Monday, January 26, 2026.

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 website or Facebook page for more information! We look forward to seeing you in the coming months!

*-Bill, Kim, & Matt*

**Russellton, PA, & Wintersville, OH, 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 and documents.

**Mount Pleasant Office Hours beginning**

**January 26, 2026:**

Monday/Wednesday 8:30am-7pm  
 Tuesday/Thursday/Friday 8:30am-5pm &  
 Saturday 9am-1pm

**Deadlines**

- You must have your tax information to us by April 1st to GUARANTEE that your taxes will be done by April 15<sup>th</sup>
- If you think you may owe and know or think you may need an extension, YOU must tell us you want to make a PAYMENT WITH THE EXTENSION

**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, we will not be reusing these due to safety concerns. You will simply receive a new one at no additional charge if you choose this option again!

**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 a NEW pin;** however, if you do not, you can access the pin at [www.irs.gov/get-an-ippin](http://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.