

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 (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. 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 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 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, 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 or by calling 1-800-908-4490

Additional Information

- **Please do NOT bring your information in by piecemeal!** Please wait until the **majority** of your information is in! If you are waiting on one or two major pieces that do not come until later, please feel free to bring in the majority early; but do NOT bring in items one or few at a time!
- 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 26, 2026:
Monday - Friday 8:30am-6pm
Saturday 9am-1pm