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January 2026

Dear New or Prospective Client,

Welcome to the BK Y Financial family! We hope you and your family have enjoyed 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 BK Y, we offer tax preparation in addition to numerous other accounting services, and are always open to give advice and answer questions.

For the 2025 tax season, we will offer sit down appointments at our Russellton office ONLY, and 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 via Progress Sharefile so you can upload all of your documents to us electronically. If you would like to use the "Digital Drop Box" please let the specific office know at their respective email 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 payments, 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:

Russellton, PA Office: 724-265-2222 or info@bkyfinancial.com

Mt Pleasant, PA Office: 724-547-5753 or infoMP@bkyfinancial.com

Wintersville, OH Office: 740-264-4185 or infoWINT@bkyfinancial.com

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

Important Items to Provide in Addition to your Tax Information:

- Prior year tax return (for comparison)
- Driver's license or state issued ID
- Bank Information
- BK Y Taxpayer Worksheet (enclosed in packet)

Identity Protection Pin (IP Pin):

- If you have had an "IP Pin" in the past, 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

IRS Updates:

- **Refunds by check will no longer be an option this year.** It is EXTREMELY important that you provide your correct bank account to us
- **Payments by check will not 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 businesses and nonprofits** are now **REQUIRED** to file a PA Annual Report through file.dos.pa.gov (due dates can be found on our website)

Tax Preparation

Options for Tax Preparation:

1. **Appointment** – a 30-45 minutes timeslot for Bill or Kim to review your information in person, rough in your tax return, answer questions, and see if anything is missing. *Your return will NOT be finalized in this appointment.* If all information is received, your return will be ready for pick up at your convenience two weeks from the date of your appointment. You will need to stop by the front desk to sign, pay for, and pick up the completed returns.
2. **“Drop Off” Options:**
 - a. **In Person** –stop by any location during business hours to drop off your information with the receptionist (Russellton has an outside drop box too!)
 - b. **Mail in** –you can mail your information to any office
 - c. **Digital Drop Box** –email us for a link that lets you safely upload your information electronically via Progress Sharefile

Notes for ALL Drop Offs:

- You must have your tax information to us by **MARCH 4TH to GUARANTEE that your taxes will be done by April 15th** (*this does NOT apply to appointments*)
- 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**

Take Home Return Type

There are three options for your personal take home return type:

1. Physical, paper copy,
2. Personal flash drive, or
3. Digital copy online through a secure link via Progress ShareFile (provide email for this option)

Our Process

Once you have chosen how you would like to go about having your tax returns completed 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. There is an additional \$10 postal charge for having your return mailed. Once we receive the signed forms and payment back, 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 or instructions if payments must be made online. 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.*

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, and information specific to tax year 2025. We are excited at the opportunity to work with you and look forward to hearing from you soon!

-Bill & Kim

Wintersville, OH, Hours beginning January 26, 2026:

Monday – Friday: 8:30am – 6pm
& Saturday: 9am – 1pm

Mt Pleasant, PA, Hours beginning January 26, 2026:

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

Russellton, PA, Hours beginning January 26, 2026:

Monday – Friday: 9am – 7pm
& Saturday: 9am – 3pm

Appointments Offered at Russellton **ONLY**
Days vary, please call for availability