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January 2026

## ARE YOU READY FOR TAX SEASON?

To help you prepare for the upcoming 2025 tax season, we have put together a package to help with the preparation of your 2025 income tax returns. Please take time to look at each document, review information carefully, and complete necessary forms before your visit to our office.

## YOUR NEXT STEPS:

1. **Taxpayer Worksheet** (enclosed) – Complete, Sign & Date **(REQUIRED)**
2. **Tax Preparation Checklist** (enclosed) – Review (if needed) & compile your tax documents
3. **Plan your tax preparation “visit”:**
  - a. Drop your information off at the office at your convenience, no appointment necessary
  - b. Mail your information to our office using **BOTH** the street address and PO Box
  - c. Upload your information via Sharefile (please email [info@bkyfinancial.com](mailto:info@bkyfinancial.com) to set up!)
  - d. Schedule an appointment by calling the office at 724-265-2222 or by emailing [info@bkyfinancial.com](mailto:info@bkyfinancial.com)

## **DROP OFF (IN PERSON, DIGITAL, & BY MAIL) DEADLINE FOR TAX PREPARATION: MARCH 4<sup>th</sup>**

- In attempt to avoid complications brought on by unmet deadlines, our company sets deadlines for ourselves and our clients in order to meet the deadlines set by the governments. We also have to take into consideration the large volume of clients that we deal with; as well as, the possibility of circumstances arising that are out of our control. Due to this, to guarantee that your return is done by April 15<sup>th</sup>, we ask that you have your information to us by March 4<sup>th</sup>. (This does NOT apply to appointments)
- **Any information dropped off after this date will receive an extension** to avoid late filing penalties. If you owed money last year and/or think you may owe this year, we can provide estimated payment instructions to help to avoid additional penalties and interest.

## **TAX YEAR 2025 APPOINTMENT FORMAT**

- **Our appointment format this year will combine aspects of previous years after some feedback. The appointments are shorter but will be able to accommodate questions and a rough in of your tax return.**
- **Your tax return will be finalized two weeks to the date of your appointment and you will get a call to come sign for, pay for, and pick up your tax return. You will be able to do so at your convenience; no formal pick-up appointment will be scheduled.**

The Russellton office will be open for tax season hours beginning Monday, January 26<sup>th</sup>, 2026. We will begin accepting tax return information on this day via drop off service; however, appointments will not begin until the following Monday, February 2<sup>nd</sup>, 2026.

*\*Please see the reverse side for reminders, IRS updates, & additional details before planning your visit!\**

## **\*\*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 by logging into your ID.me account, by calling 1-800-908-4490, or by visiting [www.irs.gov/get-an-ippin](http://www.irs.gov/get-an-ippin)

### **Additional Information**

- Drop off preparation has a **5 week turn-around time** but may vary due to circumstances out of our control
- 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!
- There will be a price increase for returning clients this year. Please remember, there could also be additional fees based on additions to your return such as additional states, new business ventures, property tax rebates, etc.
- 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!** If need be, we can mail your return to you or reschedule appointments

#### **Office hours beginning January**

**26<sup>th</sup>, 2026 through Tax Season:**

**Monday – Friday: 9am – 7pm**

**Saturday: 9am – 3pm**

**Sunday: CLOSED**

### **ATTENTION: NEW TAX UPDATES EFFECTIVE FOR TAX YEAR 2025**

1. Refunds by paper check will no longer be an option this year. It is **EXTREMELY IMPORTANT** that you confirm your bank account with us **EVERY YEAR** due to this change.
2. Payments by paper check will no longer be an option this year. You will be able to (1) use your bank account to set up a 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.
3. 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.
4. 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](http://file.dos.pa.gov) (due dates can be found on our website)

*We greatly appreciate your business and look forward to seeing you soon! If you have any questions, please give us a call at 724-265-2222. Thank you! -Bill & Kim*