



Welcome to tax season 2025! Thank you for placing your trust in me for your tax preparation this year. Please review this letter and the attached documents for more information regarding tax filing this year. You can also check out my website [www.bkcpainc.com](http://www.bkcpainc.com) for more checklists and information.

The following items are attached to this email:

- **Checklist**

This is my standard checklist to gather the information that you may need. If you require any special forms related to business, rentals, etc. please check the 'documents' tab on my website at [www.bkcpainc.com](http://www.bkcpainc.com) for additional forms. Returning clients will also find a personalized organizer in your Onvio client portal.

- **Engagement Letter**

This letter outlines the services provided by me and the information required from you for preparation of your returns. Please sign this letter and return it to me with your tax documents.

- **Portal Tips & Best Practices**

If you plan to use the portal, please read this document with recommendations for uploading documents for a smooth preparation process.

The IRS will open individual tax filing near the last week of January (final date has not been announced). Most tax forms can be postmarked as late as January 31<sup>st</sup> and some do not have to be mailed to taxpayers until February 15<sup>th</sup>, so to avoid holding returns waiting to e-file or missing any important documents **I will begin taking client appointments on February 2<sup>nd</sup>.**

**Please plan to drop your documents off on or before March 30<sup>th</sup> or March 20<sup>th</sup> if you have a business or rental.** My typical turnaround for individual returns is 2-3 weeks from the drop off date. In order to schedule the end of season workflow, I am asking that all clients drop off tax information before this date. Anyone dropping off documents after that deadline may need to file an extension, depending on scheduling and the completeness of documents.

After you have gathered the necessary information to prepare your taxes, you have the following options for sharing that information with me:

- **Upload your documents** to the Onvio client portal. You can go to my website at [www.bkcpainc.com](http://www.bkcpainc.com) for a link to login to the portal. If you have not previously set up a portal login, let me know and I can send you an invitation.
- **Use the secure drop box** on my porch to drop off your documents at any time, no appointment needed. I have a new drop box this year to better accommodate larger files & envelopes.
- **Make an appointment** with me to drop off your information. You can use this link to schedule an appointment to drop off your documents if you need to meet with me. If you are using the drop box, you do not need to schedule an appointment. <https://calendly.com/betsykcpa/taxes>