



Tax Season Greetings from H&E,

I hope this note finds you well and the new year treating you kindly. Believe it or not, income tax time is here!

With that in mind, the enclosed information has been prepared to assist you in gathering information for your 2024 tax return. Please review it, answer any questions that may apply, and use the enclosed envelope to return your tax documents to us. In addition, if you'd like to receive a Tax Organizer, please call the office or email [Kim@handetax.com](mailto:Kim@handetax.com) to request one.

**We request that you get your return information to us no later than March 24, 2025, to meet the April 15<sup>th</sup> deadline. Information received after this date may require your return to be put on extension.**

Here are the options to get your supporting tax documents to us:

1. Upload your documents to our secure portal. Go to [handetax.securefilepro.com](https://handetax.securefilepro.com), under Guest Exchange, click UPLOAD. Enter your name, email address, choose a preparer, include a message and SELECT documents to upload. Click UPLOAD. Want to create your own portal account? Visit <https://handetax.com/tax-season> to request portal access.
2. Drop-off at our office at The White House Office Building: 7030 E. Genesee St. Fayetteville, NY 13066. Drop-offs welcome weekdays during business hours, EXCEPT WEDNESDAYS. The office is closed to visitors on Wednesday. Alternatively, use the secure mail slot in the door for afterhours drop off.
3. Make a tax appointment. If you'd like to meet and review at drop-off, please call 315-449-3599 to schedule. We've designated Thursdays and Fridays for drop-off appointments through March 21<sup>st</sup>.
4. Mail your documents to H&E Tax Services, 7030 E Genesee St, Fayetteville, NY 13066

**NOTE: For security purposes, please do not send tax documents by email, see #1 above and use our portal.**

Once we have your tax documents, we will prepare your return and contact you to complete the filing.

**Tax Season Office Hours:** Monday – Thursday from 9:00-6:30 (Closed to Visitors on Wednesday)  
Friday from 9:00 – 5:00 and Saturday from 9:00 – 1:00

We look forward to seeing you soon. We appreciate your trust in our business, and while it's a very busy time, it's always great to see our clients and catch up. Please call the office with any questions or if you need additional information.

Sincerely,

**The H&E Team**

Kim Ellithorpe with Karl Herba

Jay Byrnes

Ernie Volpe

*The best compliment you can give us is a referral, and we'd greatly appreciate them!*

**H&E Tax Services**

The White House Office Building | 7030 E Genesee St. | Fayetteville, NY 13066 | 315.449.3599 | [handetax.com](https://handetax.com)