



Welcome to Tax Season!

We hope your 2026 is off to a great start! Thank you for trusting H&E Tax Services with your tax needs. We look forward to working with you again this season. It's always great to see our clients and catch up, it's the one thing we look forward to during this very busy time.

We've included the following information to help you prepare your 2025 tax return. Please review the details, complete the engagement letter, and return it with your tax documents in the enclosed envelope. Additionally, if you'd like to receive a Tax Organizer, please call the office or email Kim@handetax.com to request one.

We request that you get your return information to us no later than March 23, 2026. 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. **Drop off** at our office without a personal meeting. 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 after-hours drop off.
2. **Scan and upload** your documents to our secure portal. Visit <https://handetax.com/tax-season> to request portal access. Or visit 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.
3. Make a tax appointment. We've designated Thursdays for drop-off appointments through March 20th. Please see additional appointment information on the back.
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 #2 above and use our portal.

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

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!

See Back for Additional Information

H&E Tax Services

The White House Office Building | 7030 E Genesee St. | Fayetteville, NY 13066 | 315.449.3599 | handetax.com



Tax Season Office Hours

Monday-Thursday: 9:00-6:30 (Closed to Visitors on Wednesdays)

Friday: 9:00- 5:00

Saturday: By Appointment, please call ahead.

Sunday: Closed

Appointment Schedule

- Drop-Off Appointments: Available on Thursdays through March 19.
- Sit-Down Meetings: Limited to 15 minutes, except for new clients or significant changes
- Call us to schedule. Any member of our team can help you.

Things to Keep in Mind

Engagement Letter

An Engagement Letter has been included in this mailing, please complete it, including the required signatures and return it with your tax documents at drop-off.

Tax Documents

- Please do not send in your paperwork until you have received **all your tax documents**. We encourage you to wait until the week of February 2nd before dropping off as the deadline to mail most tax related documents is Jan 31st. Our policy is to start returns once all documents have been received.
- Please help us by opening your mailed items and include only the “official” 2025 tax documents. Monthly, quarterly, even annual statements or stubs are not needed.
- Once again, please **DO NOT EMAIL your tax documents to us**, for our safety and yours, please use our secure portal.

Banking Information

If your bank information has changed from what we had on file last year, please provide us with a copy of a voided check or bank letter with the routing and account numbers. Taking this information verbally leaves room for errors.

Driver’s License or State ID

If you renewed your driver’s license in 2025 or already this year, please fill out the DL info on the enclosed tax envelope.

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