

January 13, 2023

Tax Season 2023

I hope this message finds you well. I expect this tax season will be even more of a return to the years past, but know full well that a lot of what we do will never return to what we knew as “normal”

As we had offered this time last year, if your preferred method is an in person appointment, we have again returned to that practice for the 2023 Tax Season. As in years past, simply contact our office by telephone at 215-462-7130 and dial extension 102.

Over the past 3 years, there has been a considerable shift in the number of clients who prefer to simply upload their materials, communicate whatever else we may need to know via email, and will only request an appointment via phone or Zoom, only if they feel it is necessary. All of the same procedures and systems are in place to enable you that process. Mailing and dropping off your materials continue to be an option for getting us your work as well.

Know that we are always available by phone and email, not only during the busy months of tax-season but all throughout the year, for any questions and concerns you may have. And my staff and I will make ourselves available as best we can in whatever way we can.

When the returns are complete, they can be picked up, mailed to you, or sent to you via secure electronic package on email. Each year a growing number of clients utilize our email and secure portal and we continue to receive the most positive feedback regarding our efficiency and ease of use.

Listed below are the changes and enhancements that we have implemented these last couple of years, and continue to offer to help make this process as seamless and efficient as possible for you. Along with various methods for getting your work to us, and us getting your completed work back to you.

DROP BOXES

We will continue to provide secure drop boxes at both our South Philadelphia and Washington Township offices. Simply drop the materials in the box. Please include any and all information you feel pertinent to the entire process, including your preferred method of contact, and if you would like a call or online meeting scheduled. Our website includes a handy information sheet you can use to provide us with this information. The box at the South Philadelphia office will be located on the landing on the steps inside the lobby. The lobby door will normally be open from 8am to 8pm Monday to Thursday and 8am to 5pm on Friday and Saturday. The box in the Washington Township will be located outside of the lobby and will be available around the clock.

US POSTAL OR OTHER COURIER SERVICE

We ask that all information sent to us via mail and courier be sent to the Philadelphia office at 1546 Packer Avenue 2nd Floor Philadelphia, PA 19145. Use this address regardless of where you reside or normally schedule your appointment. Please included any and all information you feel pertinent to entire process, including your preferred method of contact, and if you would like a call or online meeting scheduled. Our website includes a handy information sheet you can use to provide us with this information.

For all materials being dropped or mailed to please include our [info sheet](#).

EMAIL AND SECURE LINK PORTAL

An increasing number clients last year chose to use our secure portal to upload their information to us, and it was met with great success and solid performance.

The link for the portal can be found on our website www.mcnallyaccounting.com and any emails can be sent to info@mcnallyaccounting.com. For your safety and security, we ask that you not send us sensitive information as a simple email attachment, as it could be compromised in that form. We would also ask that information not be sent to us as a picture or in a picture format, as it can be very difficult for us to view, print and save documents in this format. And a best practice it to wait and send all of your materials as one download. Sending the information in a piece meal format only serves to bog down operations here in the office.

COMPLETED RETURNS

Once your returns are complete you will be contacted via your preferred method of contact, regarding getting your package to you and the next steps. That delivery method could be US Postal or any other courier. Also, new this year, will be given the opportunity to have your entire package sent to you electronically. You will also be able to then electronically sign the E File authorizations and return them to us electronically as well. Instantaneous, and no trips to the post office or postage fees!