

Client Portal Link

<https://mellontaxservice.securefilepro.com/portal/#/login>



Dear Valued Client,

We hope this letter finds you well; this has been an unusual year for us all. The health & safety of our employees & clients is very important to us. Also, not knowing what restrictions we will be under for the 2021 tax season, we have 2 options for dropping off your return:

Option 1) Online Portal – Through our software company, we have setup a secure online portal. If you setup a personal portal through us, you will be able to “drop off” your tax documents (W2’s, 1099’s, mortgage statements, etc) from the comfort of your home! It’s as easy as scan the documents on a PC or take a picture of each document on a smartphone & upload to us.

- Once we receive them we will prepare your return as normal & call you if we have any questions.
- When your return is complete, you will be able to pay our bill electronically or credit card over the phone.
- We will then send you the required forms to be signed electronically & an electronic copy of your return.
- Once we receive the signed forms back electronically, we will file your return electronically as usual.

You will receive the same friendly service we have provided for 89 years without having to leave your home! We hope you find the portal easy & convenient to use. We will, of course, be available by phone if you have any questions through the process.

All we need to get you started is your email address. You must be 18 to setup a portal. If you have dependents under age 18 who file a return, you can send their W2’s to us through your portal. Dependents 18 & over (regardless of if they are claimed by someone) should setup their own portal. You can neatly write your email address down on paper & mail it to us or drop it in our mail slot. You can also email us at MellonTaxService2021@gmail.com by Jan 15th from the email address you wish to use for your account.

**Either way, please include your full name (& spouse, if joint), address, phone number, email address, & last 4 digits of your social security number (for identity verification). Be sure to only put the last 4 digits of your social, you should never include your entire social security number in an email. During the month of January you will receive an email invite from us with a link to setup your secure personal portal.

Option 2) Mail/Drop slot – We have installed a new, larger drop slot (located to the right of our front door on the newly concreted area.) Like many of you did during the early months of the pandemic, you will be able to drop off your tax documents through our new drop slot.

- Please open your mail first so you can verify the sender (employer, mortgage company, etc) has your information correct (name, SSN, income, etc).
- Put all your tax documents into an envelope (or whatever you have that you can keep it all together) & slide it through our drop slot. Please be sure to include your phone number.
- Once we receive it, we will prepare your return as normal & call you if we have any questions.
- When your return is complete, you will be able to pay our bill by credit card over the phone.
- We will then mail to you your packet (which you normally pick up in the building). Included in the packet will be your original documents you gave us, a complete copy of your return, & the electronic filing forms

that need to be signed by you (& spouse, if joint).

- Once you return the signed electronic filing forms, by mailing them back or dropping them in our drop slot, we will file your return electronically as usual.

We have used the Mail/Drop slot process throughout the pandemic with success. Like clients using the portal, you will receive the same friendly service we have provided for 4 generations while helping to keep everyone safe. We will, of course, be available by phone if you have any question through the process.

****Whichever option is easier for you**, please include a copy of your (& spouse, if joint) drivers license. For fraud/identity protection, the state of Indiana (like most states) requires us to enter your drivers license information to file your return. Also, please complete the attached questionnaire & include it with your tax documents you send us (for the portal you can scan it or take a clear picture & upload it). The questions are similar to the questions we ask you every year during drop off.

At this time, we are assuming our building will be closed to the public & all business will be handled by phone, online portal, & mail/drop slot. We will be available for phone calls during our normal tax season business hours: Monday - Friday 9-5 & Saturday 9-12. You can also leave us a message anytime & we will get back to you as soon as possible.

Thank you for your continued business & stay safe.

Mellon Tax Service