

Drop off options for returning clients (if we did your 2019 tax return)

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 – 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 them to us. Be sure to also upload a copy of your (& spouse, if joint) drivers license and the questionnaire we mailed to you early January.

- 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.
- 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.

All we need to get you started is your email address. You must be 18 to setup a portal. If you have dependents who you claim under age 24 who file a return, you can send their W2’s to us through your portal. Dependents 24 & over (regardless of if they are claimed by someone) should setup their own portal. You can email us at MellonTaxService2021@gmail.com from the email address you wish to use for your account. 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. We will then send you the link to set up your account.

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 be sure to also include a copy of your (& spouse, if joint) drivers license and the questionnaire we mailed to you early January.

- 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.

At this time, our building will remain 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.

Drop off options for New Clients

We would like to welcome you and walk you through our process for completing your taxes. Due to COVID 19, we have had to adapt the way that we take in clients. Our building is physically closed to the public until further notice. We have the same drop off options available to you as our returning clients, **but first we will need you to fill out our new client paperwork.**

To receive a copy of the paperwork needed, please email us at MellonTaxService2021@gmail.com and put New client as the subject. We will then forward you our letter explaining how the process will work along with our new client paperwork.

You can also give us a call at 219-947-1660 to request the paperwork by mail.

Thank you for choosing Mellon Tax Service and we look forward to working with you.