

O'Brien Tax & Financial Services

Palmer Office Hours & Procedures

No Contact Drop-off:

There will be a secured lockbox located directly outside of the office door to drop off your tax information at your convenience. The drop-box will be emptied daily and monitored by a security camera for your comfort and security. Any tax information dropped off by Saturday, with no additional information needed, will be available to pick up by Monday, but please wait for our call.

In Person Drop-off/ Pickup:

	Office Hours
Sunday	9-5
Monday	9-5
Friday	9-5

Virtual Portal:

This year we are introducing a secure, encrypted online platform that complies with industry-standard security measures. You will be able to do everything from fill out our tax organizer, safely upload your tax documents and additional information, communicate questions, receive your completed tax return, pay, and submit signed e-file forms in one easy to use client file transfer location. The link is **obrientax.securefilepro.com** for one time uploads, but you will need to request a log-in invitation for full access.

Mail in:

If you are mailing original tax documents we strongly recommend mailing with tracking. We will mail the completed return and documents back to you with an additional cost to cover mailing insured.

O'Brien Tax ATTN: Bernice Begley
1275 Calkins Rd. Palmer, Ma 01069

Zoom Appt:

If you feel you would be best served by having an interactive appointment a zoom apt can be scheduled at obrientax.com or you can call and we can assist you. Please submit your tax document a week in advance. There will be an additional charge for the appointment.

