

Office Policy

Welcome:

Ed O'Neill Taxes Ltd appointment process is as follows:

- ❖ Phone appointments are always available.
- ❖ Virtual appointments through zoom are available.
- ❖ In-Person appointments are limited. We will make every effort to accommodate your request **once all tax documents have been received and processed.**

Please submit **all** tax documents using one of our convenient methods:



SecureFilePro Portal – If you need an account, simply call us at 516.935.7771 or email us at Office@EdONeillTaxes.info requesting access and we will email you a link for you to establish an account. Kindly scan all documents to one (1) .pdf, if possible, when uploading.



United States Postal Service -- Please remove documents from envelopes. Do not cut or staple documents. No need to submit original documents. Keep them for your records. Clear photocopies are acceptable. No need to submit receipts. Keep all receipts for your records. Submit only totals only.



UPS -- Please remove documents from envelopes. Do not cut or staple documents. No need to submit original documents. Keep them for your records. Clear photocopies are acceptable. No need to submit receipts. Keep all receipts for your records. Submit totals only.



Federal Express -- Please remove documents from envelopes. Do not cut or staple documents. No need to submit original documents. Keep them for your records. Clear photocopies are acceptable. No need to submit receipts. Keep all receipts for your records. Submit totals only.



Fax – 516.822.6704 (Please do not fax State IDs such as driver's licenses. The poor quality makes it illegible to process). Feel free to use one of our other document submissions methods.

As a matter of courtesy and precaution, please do not come to the office for any reason if you have a cough, fever, cold or any flu-like symptoms. We will make every effort to ensure your taxes are prepared in a timely manner.

We look forward to serving you and hope this tax season brings you good health and happy returns.

Sincerely,

Ed

Office of Ed O'Neill Ltd.

