

Paller Financial Services, Inc.
2024 Health Policy
*****FOR DISCLOSURE PURPOSES ONLY*****

To keep everyone healthy we have adopted the following health policy:

If YOU are not feeling well, please DO NOT visit our office.

If WE are not feeling well, we will NOT visit with you in person.

You may provide us with your data by:

- Uploading it to our online portal (SmartVault) (call if you need assistance)
- US Mail, FedEx, or fax (Many Office Depot and FedEx stores have faxes)
- Dropping it off at our office door and then calling from the lobby

Do Not Email your data

Provided everyone is healthy we are happy to visit in person.

Otherwise, we can talk on the phone, via Zoom or communicate by email.

Staffing – we are adequately staffed to support our workload. If a staff member or their family becomes sick, they may be asked to take time off or work from home. This absence may reduce our production ability and could translate into our request that you extend your tax return filing. If an extension payment is required we will talk via telephone or Zoom to estimate the amounts and prepare an extension on your behalf.

We appreciate your business and are proud to be of service,

Paller Financial Services, Inc.