TAX Tidbits

VALICENTI
ADVISORY SERVICES, INC.
Asset management as individual as you

400 East Water Street
Elmira, NY 14901
607-734-2665

447 East Water Street
Elmira, NY 14901
607-733-9022

www.valicenti.com

Over 40 years of Cultivating Relationships

~ Our Clients Come First ~

October 2026

Transitioning to SmartVault: A More Secure and Efficient 2026 Tax Season

As we look ahead to the 2026 tax season and in an effort to enhance the security of your documents, ensure they are being shared in a safe manner and expedite the process in which we gather important tax information to prepare your returns, we are transitioning to SmartVault, a secure document storage platform. With SmartVault, you will have 24/7 access to your documents by logging in with an email and password of your choice.

There is a feature integrated with SmartVault that will allow you to complete an information request for the 2026 tax year and upload your source documents directly into a questionnaire - all being done in one area of SmartVault. There may be information that we already have, however, we ask that you fill out the request in its entirety based on how it reflects your financial situation. There may be questions that are pre-filled from your previous tax return if it was available. Please make sure to review all questions, complete anything that may be missing, and update anything that may have changed.

Initially, you will receive an invitation to SmartVault to establish login credentials. That email will come directly from notify@my.smartvault.com. This email will be sent on December 1, 2026. Please activate your account as soon as you receive the invitation.

As we approach tax season, you will receive another email from notify@my.smartvault.com with the link to your questionnaire. There will be a video link in the email that will provide instructions and guide you through the process. You can always contact our office if you have questions regarding setup and this video link will be saved on the Valicenti.com website under tax and business services.

If you do not have an email associated with your tax account, you may contact our office and schedule a time for document delivery and questionnaire preparation. Your documents will be scanned and entered into SmartVault by one of our administrators and the questionnaire will be completed at the time of appointment.

VALICENTI
ADVISORY SERVICES, INC.
Asset management as individual as you