

## Happy New Year!

I would be pleased to assist you with tax preparation this year. Please choose from one of the following convenient options:

### **By Mail:**

Ernest Palmer EA  
PO Box 384,  
Lewiston, NY 14092.

### **Mail slot (new):**

(on side door of the garage) 4335  
River Rd.  
Youngstown, NY 14174

### **Directions:**

#### **From the South: (Erie County & Niagara Falls)**

I-190 North to Exit  
25A/Military Rd-turn left.

Pass Mt. St. Mary's  
Hospital/turn right on Rt.  
104.

Drive down Lewiston Hill,  
do not exit at Lewiston;  
continue toward the  
Niagara Scenic Pkwy/Fort  
Niagara.

Turn left at the Pletcher  
Rd. exit.

Turn right on River Rd, to  
the first house on the right,  
a brick 1 story next to the  
Senior Center.

#### **From the East:**

West on Rt. 104 to  
Lewiston/Niagara Scenic  
Pkwy.

North on Niagara Scenic  
Pkwy to Pletcher Rd

Turn left at the Pletcher  
Rd. exit.

Turn right on River Rd, to  
the first house on the right,  
a brick 1 story next to the  
Senior Center.

# 2019 TAX SEASON UPDATE

## Ernest Palmer EA



January 2020

(716) 754-9989  
epalmer@eptax.com

*After a tax year filled with drastic changes last season, this year should be much more stable, with limited changes to affect your situation. Two items which are critical; please provide updated direct deposit info and include the Tax Worksheet with all paperwork.*

Although an appointment is not always necessary, if one is required, please call (716) 754-9989.

**Office location:**  
4335 Lower River Rd  
Youngstown, NY 14174.

Please, no children at the office.

Enter through the side garage door to the basement office.  
Please do not park in front of the garage.

### **Pricing:**

\$90 base fee for most returns, including 1040, Schedule A, NY State and E-File.

Small business, rentals, investments, stock sales and education credit require additional pricing (Schedules 1, B, C, D, E).

\$15 fee for returns of dependent children (when included with parent's return).

We complete returns for all States (Part-year returns also).

Referrals are always welcome and much appreciated!

**Recommendation:** For fastest service, I recommend dropping or mailing your information to me. I will call you with any questions. I normally return your packet within a week. It's a good idea to make a copy of your paperwork for yourself before delivering.

Please do not enclose copies of previous returns, unless you are a first-time client.

### **IMPORTANT: (Please Read)**

We must have the following information to complete your return:

1. If you are dropping or mailing your paperwork, you must also enclose the **2019 Tax Worksheet**, along with your W-2's, 1099's, 1098's and other tax information received in January. Also, be sure to provide current bank account information for direct deposit. Without current bank information we cannot provide direct deposit for your refund. Any refund check will be mailed to you. The Worksheet is also available at [www.eptax.com](http://www.eptax.com). Please don't send sales receipts or medical receipts of any kind.
2. If you or your or spouse had your driver's license renewed in 2019 or 2020, or you are a new client to this office, IRS and NY is requiring information from both sides of yours and your spouse's driver's license. Either enclose a copy or email a photo of both sides to [epalmer@gmail.com](mailto:epalmer@gmail.com). (No fax or text please). The same information is required for any children who are filing a return.
3. Worksheets for rental property or small business, are available at [www.eptax.com](http://www.eptax.com)
4. If there is an undergrad college student in the family, you must provide the **Form 1098-T** from the college or university in order to qualify for the American Opportunities Credit.