

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
Lewiston 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.

2020 TAX SEASON UPDATE

Ernest Palmer EA



January 2021

(716) 754-9989
epalmer@eptax.com

*Please be sure to enclose the completed Tax Worksheet with your documents.
Also, please include updated direct deposit information.*

******Important COVID Update:**

Due to the virus, there will be no appointments scheduled at the office this year. However, I will be happy to meet with you virtually, by telephone or through e-mail, if needed.

I fully expect to resume office appointments in 2022. Thank you for your understanding. I'm just trying to keep everyone safe.

Please just drop off, mail, email or use the secure portal at my website to get your documents to me and I will strive to provide the same level of service you have come to expect.

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 may require additional pricing.

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

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

New for 2020: Even if you take the standard deduction, you can claim up to \$300 in cash contributions.

I normally return your completed packet within a week. It's always a good idea to keep a copy of your paperwork for yourself before delivering items to me.

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

IMPORTANT: (Please Read)

I must have the following information to complete your return:

1. Please enclose the **2020 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 I cannot provide direct deposit for your refund. Any refund check will be mailed to you. The Worksheet is also available at www.eptax.com. Please do not enclose sales receipts or medical receipts of any kind.
2. If you or your or spouse had your driver's license renewed in 2020 or 2021, or you are a new client to this office, IRS and NY are 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@epalmer.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.
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.