

## 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-side door:

On the side door  
of the garage  
4335 River Rd.  
Youngstown, NY 14174

Just look for the one-story brick house next to the Lewiston Senior Center (which is at the corner of Pletcher Rd.

# 2022 TAX SEASON UPDATE

## Ernest Palmer EA



January 2023

(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.*

I encourage you to 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.

If an appointment is required, please call me at (716) 754-9989 during regular office hours. Appointment times are limited.

After receiving your completed tax packet, please return the signed e-file authorization forms to us in the enclosed envelope.

### Pricing:

\$100 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. I will invoice the total to you with your packet.

\$20 fee for returns of dependent children (when included with parent's return).

I also prepare returns for all other States as well as multi-state returns.

Cash, checks and credit cards are happily accepted. To pay online, go to:  
<https://eptax.com/resources/make-a-payment/>

Your completed packet is normally returned to you 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 **2022 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](http://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 2022, or you are a new client to this office, I will need a copy of both sides of your driver's license for both you and your spouse. Either enclose a copy with your paperwork or email a photo of both sides to epalmer@eptax.com. The same information is required for any children who are filing a return.
3. Worksheets for rental property or small businesses, 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.
5. If unemployment was received in 2022, you will have to print the 1099-G from the NY State Department of Labor website or call them and request that they send it.

### New for 2022:

Many of the Covid enhancements to the tax code have expired and were not renewed. Therefore, the Child Tax Credit has returned to \$2,000 per child (under age 17). Last year it was up to \$3,600 depending upon the age of the child.

Also, The Child and Dependent Care Credit, which was \$8,000 for one child and up to \$16,000 for multiple dependents, was returned to \$3000 and \$6000 respectively.

The proposed 1099-K threshold was supposed to be changed to \$600 or more for third-party payments, but the IRS has put that on hold for this year and it reverts back to the \$20,000 threshold for 2022.