

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. 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.
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.