

## 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:

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

### Secure Portal:

Just go my website and use the Guest Exchange to upload documents securely.  
[www.eptax.com](http://www.eptax.com)

# 2023 TAX SEASON UPDATE

## Ernest Palmer EA



January 2024

(716) 754-9989

[epalmer@eptax.com](mailto: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. (No texting please)

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

### Pricing:

\$110 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 my website at: <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 **2023 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 2023, 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](mailto: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 2023, 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.

## What is an Enrolled Agent?

An **Enrolled Agent (EA)** is a federally authorized tax practitioner licensed by the US Department of the Treasury.

Only Enrolled Agents, CPA's and Attorneys are authorized to represent taxpayers before the IRS regarding tax issues.

Enrolled Agents are considered specialists in tax matters.

EA status is the highest credential awarded by the Internal Revenue Service and is obtained by achieving passing scores on all the three parts of the Special Enrollment Examination.