



2018 Tax Information DROP OFF RETURNS

Did Empower Tax Services, LLC. prepare your taxes last year? YES NO

Section I – Personal and Contact Information

Name _____ Date of Birth _____ SSN _____
 Spouse's Name _____ Date of Birth _____ SSN _____
 Address _____ City _____ ZIP _____
 County _____ School District _____
 Best Phone Number to contact you on _____ Email _____

If we prepared your return last year, only provide additions, deletions and/or changes in Section I below:

Dependent's Name	Date of Birth	Social Security #	Relationship to You*	Months in Your Home	College Student?

*If the dependent is not your child why are the parents not claiming the child?

*If required can you prove that the dependent lived with you for more than 6 months? (School/medical records) YES NO

Section II – Other Changes

Please explain any changes in your tax situation from previous year(s):

Section III – Refund & Payments

Refunds: Paper Check Direct Deposit to: _____ Savings Checking
Member number
 Pay tax due to IRS or NYS: Direct DEBIT from: _____ Savings Checking Voucher & Paper Check
Member number
 Pay preparation fees: Transfer from above account Cash/Check **Delay Pay***

Is there a possibility that someone else could claim you as a dependent? YES NO

How many W2's do you have? _____

Did you itemize last year? YES NO

Do you know what your filing status is? If so, what is it? YES NO

Single Head of Household Married filing joint Married filing separate Qualifying widow(er)

Be sure to complete both pages to ensure accurate preparation of your tax return.

Did you, your spouse or dependents:	If yes, provide amount:
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Have you and everyone on your tax return had health insurance for the full year?	<input type="checkbox"/> YES	<input type="checkbox"/> NO	
-Were you covered through an employer's health plan?	<input type="checkbox"/> YES	<input type="checkbox"/> NO	
-Were you covered through the NY Health Exchange or Medicare for the full/part of the year?	<input type="checkbox"/> YES	<input type="checkbox"/> NO	
-Have you provided a 1095 A, B or C document with this tax return?	<input type="checkbox"/> YES	<input type="checkbox"/> NO	

Receive any correspondence from the IRS last year? YES NO _____

Pay or receive alimony? YES NO _____

Sell or trade any stock, bonds, mutual funds or any other assets? YES NO _____

Do you have a loss carry forward from previous years? YES NO _____

Receive any gambling winnings? YES NO _____

If yes, did you incur any gambling losses? YES NO _____

Receive any prizes, awards or jury duty pay? YES NO _____

Receive any unemployment? YES NO _____

Pay interest on a mortgage? YES NO _____

Pay and interest on a Home Equity loan? YES NO _____

If yes, was the loan used to repair or buy residence*? YES NO _____

(The deduction for personal interest paid on a HE loan and LOC is suspended and disallowed unless the proceeds are used to buy, build or substantially improve the tax payer's home that secures the loan.)

Pay property taxes? Multiple properties? YES NO _____

Have rental property? How many? YES NO _____

Pay interest on a boat or (with a lavatory & sleeping accommodations)? YES NO _____

Pay interest on student loan(s)? YES NO _____

Pay tuition to a college or trade school? Please include a 1098T. YES NO _____

529 Plan? Education contribution or distribution? YES NO _____

Pay any childcare expenses such as daycare? Please list amount for 2018. YES NO _____

If so, provide the Name, Address and Tax ID Number or Social Security number of caregiver

Buy or sell any real estate? YES NO
 (Please include Settlement Sheet)

Make any charitable contributions? YES NO
 (Please provide receipts)

Should you be receiving any 1099's for investment accounts? YES NO _____

Make or intend to make an IRA/Roth IRA or SEP Plan contribution for 2018 or 2019? YES NO _____

Rollover any amounts from a retirement account in 2018? YES NO _____

Pay health insurance or long-term care premiums out of pocket? YES NO _____

Receive Social Security or income from a retirement account? YES NO _____

Have any self-employment? YES NO _____

Work from a home office or use your car for business? YES NO _____

Have income from any other source? YES NO _____

Have a cancellation of debt or foreclosure? YES NO _____

*Available only to Empower Federal Credit Union members. Empower Tax Services, LLC will charge an additional \$15 processing fee to members who elect to delay payment for up to 21 days while they await direct deposit of their tax refund. Participation in the Delayed Payment program is voluntary. Empower Tax Services, LLC will have the fees transferred from the same account indicated or the direct deposit but reserves the right to collect from any Empower FCU account which either the Taxpayer or spouse has signature authority over including lines of credit and other member numbers.