2019 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 ____________________

Driver's License # ____________ State ______ Issue Date ________ Exp. Date ________ Document # __________

Driver's License # ____________ State ______ Issue Date ________ Exp. Date ________ Document # __________

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: ______________
account number

Pay tax due to IRS or NYS: ☐ Direct DEBIT from: ______________ ☐ Voucher & Paper Check
account 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? If so, how much was your NYS refund? ☐ 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:
Did you receive a 1095 A, B or C for health insurance? Please include a copy.	☐ YES	☐ 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 any 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 2019.	☐ YES	☐ NO	________________

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

____

____

Buy or sell any real estate? (Please include Settlement Sheet)	☐ YES	☐ NO	
Make any charitable contributions? (Please provide receipts)	☐ YES	☐ NO	________________
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 2019 or 2020?	☐ YES	☐ NO	________________
Rollover any amounts from a retirement account in 2019?	☐ 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 $20 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.