



2020 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:
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-Did you receive your economic impact payment (stimulus)? If yes, how much? _____

-Make any withdrawals from a qualified retirement plan specifically due to the Covid-19 pandemic? _____

- 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 taxpayer'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 2020. YES NO _____

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

- 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 2020 or 2021? YES NO _____
- Rollover any amounts from a retirement account in 2020? 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.