



S . C . M . E . B . F . PARTICIPATING TAX PROVIDERS

Members may call one of the following Tax Preparation Providers to make an appointment. These Tax Providers will accept the Fund's scheduled payment as payment-in-full for the preparation of a short form (Federal 1040A or 1040EZ and NYS). The fee for the long form (Federal 1040 and NYS), along with Schedules A (Itemized Deductions) and B (Interest Income), will only cost the member \$5.00 *, plus the Fund's payment. If other IRS forms and Schedules are required, the provider's fee schedule shall be discounted a minimum of 25% for their preparation. The member is responsible for the payment of these fees at the time the return is prepared and must present the Fund's Tax Voucher to the preparer for signature and processing through the Fund.

BOHEMIA

Peggiann McCoy, CPA
631-981-6646

BLUE POINT

Martha Rose, CPA
631-988-0209

BRENTWOOD

Tax Kingdom
631-371-1515

COMMACK

Moss J. Kaufman, CFP, EA
631-366-1999

EAST SETAUKET

Linda M. Eicholz, CPA
631-331-4369

HAUPPAUGE

John A. Baldi, CPA, PFS, MBA
631-524-5554

Martha Rose, CPA

631-988-0209

HOLBROOK

Francis M. Neary, CPA, MBA, RIA
631-271-7788

JERICHO

Philip Fierro, CPA
516-933-3845

LAKE GROVE

Alfred DiCanio, CPA
631-588-2316

LAKE RONKONKOMA

Charles Marchese, CPA
631-588-7500

MASTIC

Tax Kingdom
631-657-3930

MEDFORD

Tax Kingdom
631-286-3618

MELVILLE

Francis M. Neary, CPA, MBA, RIA
631-271-7788

MIDDLE ISLAND

Middle Island Accounting & Tax Service
631-924-0023

MILLER PLACE

William J. Rothaar, CPA
631-476-1469

NESCONSET

John Helldorfer, CPA
631-724-9620

PT. JEFFERSON STATION

Linda M. Eicholz, CPA
631-331-4369

Molloy Tax Services
631-786-9521

William Fore, CPA
631-642-1300

SHIRLEY

Manuel Santana, M.S., AFSP
631-223-9629
917-604-8812

SHOREHAM

Sean J. McDonnell, CPA
631-821-9768

SYOSSET

Francis M. Neary, CPA, MBA, RIA
631-271-7788

WEST BABYLON

Sebastian Neglia, M.S., CPA
631-589-4839

WEST SAYVILLE

Sebastian Neglia, M.S., CPA
631-589-4839

WOODBURY

Francis M. Neary, CPA, MBA, RIA
631-271-7788

FOR NON-PARTICIPATING PROVIDERS - The voucher is to be completed by the preparer, signed by both the member and the preparer, and submitted to the Fund, along with the original paid bill on preparer's original letterhead AND a copy of pages 1 and 2 of your 1040 or 1040A filings with the tax preparer's name on page 2, or page 1 of the 1040EZ form with tax preparer's name. These items MUST be presented in order to receive reimbursement. The only required information on the tax form is the top portion of the first page, indicating the member's name and dependents. The tax preparer's name must be shown on the last page. The financial information and social security numbers are not required to process the claim and may be removed or covered prior to filing your voucher.

FOR "DUAL MEMBERS" - When using any of the providers listed above, there is no additional \$5.00 out-of-pocket charge to "Dual Members" (spouses, who both are members of Benefit Fund, filing a joint return & each presenting a tax voucher) for the preparation of the long 1040 tax form, Schedules A and B, and related NYS return. The Fund's payment to these providers for one member is \$70.00 and \$5.00 for the spouse, totaling \$75.00. "Dual members" are eligible for an additional \$65.00 reimbursement on their joint tax return... to be applied towards any additional "tax schedules" necessary for the completion of their joint tax return.