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**Are there any customer stories that resonate with you?**

“One time I had a guy come in. His wife was upset because they kept getting letters from the IRS each year wanting more money. He came in and the IRS wanted about \$30,000 and Oregon wanted another \$7,000. I looked at his tax return and found out he was paying taxes on his personal home that he had sold. I re-did his taxes for him and he didn’t owe anything on it and he got back a refund of almost \$60,000 plus interest. So he comes and gets his taxes done here every year.”

**How much is it to file?**

“\$69 for the federal and \$59 for any states we have to file. If it’s more complicated it goes up.”

**Who are your typical customers?**

“We get all kinds of customers from students to businesses — a little of everything.”

**What’s your favorite part?**

“Just getting to help people. Most people leave pretty happy knowing it’s done right.”

**What’s the most common mistake people make with their taxes?**

“The most common mistake is not mak-

ing sure they get all the credits or deductions they’re entitled to.”

**Is there any part of the business that’s surprised you?**

“Actually, yes, when I came into the business I was surprised by how many people file their taxes late. My first month someone came in and needed to file seven years of taxes.”

**How far back can you file?**

“To get a refund, you can only file back three years. If you wait too long, then you just lose your refunds. If you owe, the IRS can make you file back as far as they want.”

**What’s the most common question you get?**

“The most common question is, ‘How long does it take to get my refund back?’ (Ha-ha). We have the option for some customers to get an advance on the refund without any fees. Now they can get some of it for free. That was one of the reasons I was excited about buying H&R Block because they have a few things that help take care of customers.”

**What are the benefits of having professional tax professional help?**

“You can be confident and have the peace of mind that they’re done correctly.”

**Are there any common misconceptions you encounter?**

“The idea that people can claim their boyfriend or girlfriend’s kids as their own, when in reality, until you’re married, they’re not yours unless they’re blood. They’ll try to get extra credits that way and come in here and find out they’re not allowed.”

**What should people bring (when filing)?**

“They should just make sure they’ve waited for all their documents in the mail. Employers are required to mail them out by Jan. 31. If they have any questions they can call and we can make sure they have everything.”

**Are there any particular changes this year that people should be aware of?**



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LUKE WHITTAKER

H&R Block Tax Consultant Chris Holloway poses for a photo with his loyal, 14-year-old companion Millie. Holloway, 46, also has four kids with wife, Julia, ages 26, 24, 18 and 15.

“One of my favorite parts this year is there is no longer a penalty for not having health insurance. They took away the mandate that it’s required and if not you got penalized on your taxes. I hated that part because I had to tell people “You would get a refund but you owe for insurance or you owe this. It wasn’t fair. They’ve also changed the W-4, they have one for Ore-

gon and one for federal. It helps people limit their tax liability a little bit.”

**Now at the start of 2020, are there things you recommend people do to limit their tax liability in the new year?**

“They should make sure they get that new W-4 filled out. That way, it’s correct for Oregon and federal, now that we have a form for each.”

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