

Preparing to Prepare: It's Tax Season

Preparing your federal income taxes poses a bigger challenge than actually doing them. Planning ahead of time for what forms you will need is a much more organized approach to tackling that tax season frustration.

Obtain the Right Tax Form

Many people utilize the same tax forms they had used the previous year. But, if your circumstances have changed, you may need to change the forms you use! To know which form is right for you, visit the [IRS website](#) to see which forms to use.

Follow the link below for a full list of Income and Deduction/Adjustment information you should have collected to better prepare yourself. If you have to scavenge for each necessary item, make a commitment to keep good records from this point forward. It will make this time next year a much less demanding experience.

[Read More](#)

It's Like You Get Paid To Shop! Get Cash Back on What You Buy.

3.00%

Cash Back on
Debit Card
Purchases.*

[Open an Account](#)

Ask for **KASASA®**

Try FREE Kasasa® Checking.

- Refunds on ATM withdrawal fees*
- No monthly maintenance fees, ever
- No minimum balance to earn rewards

*Details Apply. Offers subject to change without notice.



Gather Personal Identification Information

Of course, you will need to know your own Social Security Number, but you may need to know a few others as well. These may include those of your spouse, children, childcare provider, and anyone to whom you pay alimony.

Financial Literacy Workshops

Money Smart Kids

Thursday, February 6, 2020 7:00PM
Oceanside Library

Are You Financially Healthy?

Tuesday, March 10, 2020 7:00PM
Oceanside Library

Free Webinar

Drive Away Happy: Car Buying Decisions

Session 1:

Tuesday, February 11, 2020 1:30PM

[Sign Up](#)

Session 2:

Thursday, February 20, 2020 8:30PM

[Sign Up](#)



**FALL IN LOVE WITH
YOUR NEW CAR!**

Start your search today with the region's largest inventory of new and pre-owned vehicles.

NassauFinancial.groovecar.com • (866) 476-6834

GrooveCar
POWERED BY FUSION

Holiday Closings

Presidents Day: Monday, February 17, 2020

Our Online, Mobile, and Telephone Banking Services remain available to you 24/7.

Your Dream Home is in Reach!

Home buying season is around the corner. Whether it's your first Mortgage, a new purchase, or you are refinancing your current Mortgage, we'll assist you every step of the way.

[More Info](#)



Enjoy 100 Days of Giveaways at Oyster Bay!

Join us in continuing the celebration of our newest branch opening in Oyster Bay as we reward YOU, our valued Members. Stop by our branch to say hello and receive a small gift, and be sure to enter our weekly online **Grand Prize Giveaway** for a chance to receive a swag bag containing our VISA® Gift Card and other goodies from local vendors in the Oyster Bay area!

Here's How to Enter:

[Enter Here](#)

- 1) Click on the button to enter the giveaway
- 2) Share the link with a friend and receive a bonus entry for referral
- 3) Tag us @NassauFinancial on Instagram and/or Facebook
- 4) You may enter weekly until 4/30/20
- 5) Winners will be chosen every Friday and are invited to our branch in Oyster Bay for a photo op & to receive their prize!

Good luck and we hope to see you in town!

*100 Days of Giveaways 2020. No purchase necessary to enter or win. Must be 18 years or older to be eligible. Prizes valued over \$100 may result in the issuance of a 1099-Misc. as income earned. Prizes subject to change without notice. Limit one Grand Prize per person. Grand Prize will be awarded weekly. Winner must be present to receive prize at the branch.

Get more mileage from your tax refund.

Enterprise car sales

[Shop Now](#)



NassauFinancial.org | 516.742.4900

For a complete list of Branches, Service Centers and Business Hours visit [NassauFinancial.org](#)

We make loans without regard to race, color, religion, age, sex or national origin. We do business in accordance with the Federal Fair Housing Law and the Equal Credit Opportunity Act. Federally Insured by NCUA. Equal Opportunity Lender.



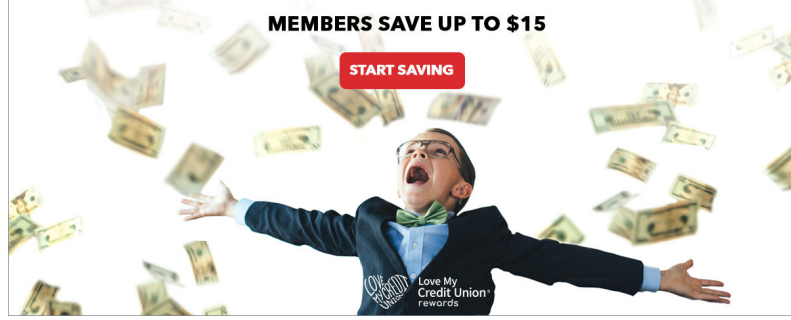
STAY CONNECTED! Follow us on Facebook, Twitter, Instagram and YouTube, and register for eAlerts on our website [NassauFinancial.org](#)



GET YOUR MAXIMUM REFUND GUARANTEED

MEMBERS SAVE UP TO \$15

[START SAVING](#)



Get your maximum refund guaranteed with TurboTax! What's even better, Nassau Financial Federal Credit Union Members can save up to \$15. [Start today!](#)



Your Financial Advisor is Here to Help

George K. Mouradian
Financial Advisor

George will help put you on the right path for retirement. Listening to your needs and reviewing your goals are just a few things he can do to guide you to your investment goals.

Contact George

Securities sold, advisory services offered through CUNA Brokerage Services, Inc. (CBSI), member FINRA/SIPC, a registered broker/dealer and investment advisor. CBSI is under contract with the financial institution to make securities available to members. Not NCUA/NCUSIF/FDIC insured, May Lose Value, No Financial Institution Guarantee. Not a deposit of any financial institution. CBSI is a registered broker/dealer in all fifty states of the United States of America. The representative may also be financial institution employee that accepts deposits on behalf of the financial institution.

IRA Changes: What to Know

The age when RMDs from Traditional IRAs must generally begin is increased from age 70½ to age 72. This change is effective for distributions required in 2020 and later years, for those who reach age 70½ in 2020 or a later year.

Click the button below to read more about the 2020 changes, or visit [IRS.gov](#).

[More 2020 Changes](#)

- | | |
|--------------------------------|----------------------------------|
| Everett A. Boccafolo, Chairman | Gary P. Soricelli, Vice-Chairman |
| Janis B. McDermott, Secretary | Paul Egarter, Treasurer |
| Carmine P. Miranda, Director | Michael Kwaschyn, Director |
| Francis X. DeFontes, Director | |