

The Credit
Union
Experience

January 2008



Do You Pay Too Much for Your Tax Return?

Pioneer WV Federal Credit Union and its tax agency are ready to help you this season! Davis Tax Agency has been around for many years assisting local individuals and businesses with tax and accounting services. The credit union purchased the tax agency in 2006 to offer it's members as well as the clients of the tax agency a wider range of products and services. Every member of the credit union is encouraged to take advantage this year's special offer of a \$10 off coupon on any tax preparation fee. In addition, our members are reminded that you are entitled to a larger tax preparation discount for being enrolled in any of the credit union's loyalty clubs. For convenience purposes...members may drop off their tax return information at any Pioneer location.

Davis Tax Agency offers professional and confidential services at extremely affordable prices. Our staff there has years of experience that will work hard to ensure you receive every allowable deduction and credit you qualify for. For more information about the Davis Tax Agency...you may call the credit union at 348-6648 or call the tax agency directly at 776-1340.

MEET YOUR TAX PROFESSIONALS:

Tonya Clendenin—I worked for Davis Tax Agency, Inc. for 23 1/2 years when Pioneer WV Federal Credit Union bought the company. I have been employed here now 25 years in November 2007. I enjoy meeting and talking with our clients any time they feel the need and especially during the tax season to have their Tax Returns prepared. I manage the office, meet with clients, process payrolls and do bookkeeping for various business clients we have. We are a full service Bookkeeping and Tax office. We try to meet all the needs of any of our clients. Every year before tax season, I attend several different Seminars that help prepare our staff with all the necessary IRS changes. This helps us to answer questions and prepare our clients returns as competently and precise as we can be. Our clients are our Number "1" Priority. We look forward to taking care of our clients from last year and look forward to meeting a lot of new clients for this Tax Season.

Carol Lawson—I have been preparing taxes and doing Bookkeeping since 1990. I was hired with Pioneer/Davis Tax Agency in August of 2006. I have taken all H & R Block classes including: Basic, Intermediate, Advanced I, Advanced II and Partnerships and Corporations. I took the Jackson Hewitt Advanced Level I & Level II. Every year we attend update classes or seminars. This year Tonya and I took the PTI (Professional Tax Institute) update, Thomson Gear Up for Personal & Business Entities seminar, Electronic Filing for Federal & State Seminar and Vern Hoven Federal Income Tax Update for Professionals.



Pioneer WV Federal Credit Union 2008 Holiday Schedule

The credit union will be closed on the following dates:

New Year's Day – Tuesday, January 1, 2008

MLK Day – Monday, January 21, 2008

Memorial Day – Monday, May 26, 2008

Independence Day – Friday, July 4, 2008

Labor Day – Monday, September 1, 2008

Columbus Day – Monday, October 13, 2008

Veteran's Day – Tuesday, November 11, 2008

Thanksgiving – Thursday, November 27, 2008
and Friday, November 28, 2008

Christmas Eve – Wednesday, December 24, 2008

Christmas Day – Thursday, December 25, 2008



CU on the GO!

Recently, the credit union visited employees at Ticketmaster located in Northgate Business Park.. While onsite we opened many new accounts and spoke with several individuals about things such as Identity Theft and how they can improve their Credit Scores. In addition, we were able to explain the benefits of joining the credit union and how they and their families were eligible for membership. “This is something we are looking to do a lot more of in the near future”, said Shannon Miller, Chief Relations Officer.

If you would like the credit union to come to your place of employment and discuss certain topics surrounding the banking industry feel free to contact Marketing Specialist, Lisa Moore @ 348-6648 ext: 2125 or email lmoore@pioneerwv.org.

