

APG Tax Center offers free tax preparation in February 2010
By Sandi Williams, OSJA

The Installation Tax Assistance Program, directed by the Office of the Staff Judge Advocate, Client Services Division, provides free tax assistance each year to qualifying active duty service members, retirees, and family members. Active duty service members are those military members currently holding an active duty ID card.

Reserve component service members who are not mobilized are not eligible for services and should contact their individual units for assistance.

The OSJA will host a Ribbon Cutting Ceremony and Open House for the 2010 Tax Assistance Program from 11:00 a.m. to 12:30 p.m., February 8, 2010 at the Tax Center, located in building 30, downstairs in the Top of the Bay. Commanders or their designees are invited to preview the facility and talk with the Tax Center staff members.

The Tax Center will open its doors to the public on February 9 and will close on April 15. **Hours of operation will be 8:30 a.m. to 4:00 p.m., Monday through Friday. Trained Staff**

Civilian personnel have been assigned to work at the Tax Center on a full-time basis and will be trained in Federal and Maryland state income tax return preparation. An Internal Revenue Service examination at the end of the course certifies each preparer for the Volunteer Return Preparation Program.

Tax Returns:

Tax Center staff will only be preparing simple and intermediate level tax returns. Complex tax returns outside the scope of the Volunteer Return Preparation Program will be referred to professional providers.

Be prepared:

It is extremely important to gather the information needed to file an accurate return. Documents needed depend on each individual situation. The Tax Center cannot prepare a return unless the taxpayer brings all necessary documentation. Inaccurate tax returns caused by incomplete/faulty information may incur IRS penalty and interest assessments. Prior to arriving at the Tax Center, patrons should access the "Client Agreement and Questionnaire" located on the APG website at

www.apg.army.mil, or the Legal website at <https://www.jagcnet.army.mil/8525761700412C32>, click on Legal Assistance, then APG Tax Center. This document is extremely helpful in gathering the information needed to file an accurate return.

Information needed:

- Copy of your last tax return (2008)
- Original W-2 statements
- Social security cards for yourself, spouse, and all dependents
- Social security income statements
- Form 1099 stating interest, dividends or capital gains, distributions from pensions and IRAs
- Alimony information
- Child care expenses and provider identification and address
- Settlement paperwork (for purchase or sale of home)
- Real estate tax statement
- Economic Recovery payment received from Social Security Administration, Railroad Retirement Board, or Veterans Administration
- State and local sales and excise taxes paid on qualified new vehicles purchased after February 16, 2009 and before January 1, 2010
- Power of attorney signed by the spouse if either party plans to sign the spouse's name on a joint tax return
- Blank check with your routing and account number for a refund directly deposited into a bank account

For those who itemize deductions or own a home that is rented to others, bring materials such as:

- Mortgage interest statements (Form 1098)
- Medical receipts
- Rental reports
- Investment statements
- Charitable contribution receipts (name and address of charitable organization, date of contribution and bank receipts for cash contributions)

For stock sold this year, the taxpayer must establish the sales price and the cost basis of the stock before coming to the tax center. Staff cannot calculate these figures.

Obtaining W-2s online

Defense Finance and Accounting Service myPay is a secure, DFAS-operated Web site that lets active duty,

National Guard and Reserve military members, civilian employees, and military retirees and annuitants take charge of their pay accounts online. Soldiers and civilians can access their 2009 Tax Statements (W-2 and 1099-R) by going to <https://mypay.dfas.mil>.

Tax Forms

Federal tax forms are available at the APG Tax Center, public libraries, post offices, and at www.irs.gov. State tax forms are available online at the taxpayer's state department of revenue website.

Electronic Filing

Free electronic filing is also available through the APG Tax Center. However, Staff must prepare the tax return at the Tax Center in order to electronically file the tax return. Electronic filing enables the taxpayer to receive their refund by check or direct deposit into their bank account rather than having it mailed. The average return time is approximately three weeks for a check mailed and about ten days for deposits made directly into a taxpayer's checking or savings account.

For further information and assistance with tax preparation and/or electronic filing, contact the APG Tax Center at (410) 278-9916 beginning February 9, 2010.