Offutt Tax Assistance Office

To receive tax assistance you must be Active Duty (All enlisted ranks, O3 and below), Deployers, Surviving Spouses, Retired 65 and older, Disabled 50% or greater and income $80,000 or less, and their dependent(s). Reservists and National Guard members (in above ranks/age) and their dependents only qualify when on Title10/32 orders or retired 65 and older with a BLUE ID card. IDs valid for medical insurance only are not eligible. **No businesses or Sch K-1 Forms 1065 or 1120S.** A separate appointment must be made if your dependent needs a tax return and they must be present.

Bring the following documents/information

- **Military ID.** If filing joint, both spouses must be present prior to starting the tax return and both must have a photo ID. If one taxpayer needs to leave they can return later to sign (Will not e-file until both sign).
- **Power of Attorney** will be accepted for deployed spouse.
- **Social Security cards/copy** for you, spouse and dependents (IRS Requirement) and their **birthday info**.
- **Copy of last year's federal tax return**. You **MUST** have your 2016 return!
- **Bank information** with routing & account number (voided check required, MyPay Printout of Direct Deposit Info, NO deposit slips).
- **You will need the following forms/documents:** (cannot complete tax return without these forms).
  - **Affordable Care Act Form 1095:** Proof of medical insurance. This form is provided by your employer (1095-C), or an insurance company in the marketplace (1095-A), or an insurance company outside the marketplace (1095-B).
  - **Income Forms:** All **W2s/W2Gs** from employers and casinos; all **1099s** (i.e. Banks, Brokers, Social Security, Retirements, 529s, real estate sales); December LES and bank statements with year to date interest amounts reported; **Cost basis** for stock/mutual fund shares sold.
  - **Adjustment Forms:** All **1098s** (i.e. Student loans, College Tuition, Mortgages); all **5498s** (contributions to HSAs, Traditional or Roth IRAs for 2017).
  - **Sch A: Medical expenses paid** (co-pays for Eye glasses, dental, or doctor visits); **Taxes paid** (state income, real estate, property tax on vehicles {pink slip/registration slip}); **Interest you paid** (Mortgage, HUD-1 statement if you purchased/refinanced the home in 2017); **Gifts to charities** <u>(receipts are required!)</u> For cash, debit or check donations you will need letters from all organizations; for non-cash donations to Goodwill, Salvation Army etc., receipts are required - (**if more than $500 in donation value, provide date item was purchased, cost at time of purchase, and source used to obtain donation value**)
  - **Sch E: Rental Property:** We will prepare returns with **one** rental. (Rental income, expenses, 1099 mortgage interest, real estate taxes, depreciation.)
- **Other Receipts/Documents**
  - Child care expenses: Must include name, address & tax ID of provider.
  - Alimony: If you received it, provide amount. If you paid it, provide amount and SSN of ex-spouse.
  - Paid receipts that cover college tuition, books, lab fees, etc.
  - Signed Form 8332 from custodial parent if claiming a dependent that does not live with you. A divorce decree can be substituted for this form if divorced prior to 2009.
- **Any other documentation** for income or deductions not mentioned above.

Updated 20 November 2017