

Offutt Tax Assistance Office – Virtual Assistance

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/Title 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.**

Upload the following documents/information into TaxWiseMobile – Only submit when all documents are available! <https://offuttafbtax.taxwisemobile.com/>

- **Taxpayer and Spouse** - Military DoD # on card
- - Copy of driver's license with a photo
- **Power of Attorney** accepted for deployed spouse.
- **Must have copy of Social Security cards** for you, spouse and dependents (**IRS Requirement!**) and dates of **birth**. SSA.gov to request a copy if you do not have one.
- **Copy of last year's federal tax return.** You **MUST** have your 2019 return!
- **Bank information** with routing & account number (copy of 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 1095A** if you purchased insurance from the marketplace.
 - **Economic Impact Payment** Notice 1444
 - **Income Forms:** All **W2s/W2Gs** from employers and casinos; all **1099s** (i.e. Unemployment, Banks, Brokers, Social Security, Retirements, 529s, real estate sales, Nonemployee Compensation); 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 2020).
 - **Sch A: Medical expenses paid** (co-pays for Eye glasses, dental, or doctor visits – consolidate a list, do not upload all the receipts); **Taxes paid** (state income, real estate, property tax on vehicles {pink slip/registration slip}); **Interest you paid** (Mortgage, Closing paperwork if you purchased/refinanced the home in 2020); **Gifts to charities** (receipts are required!) 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 with breakdown of items and value - (**if more than \$500 in donation value, provide date item purchased, cost at time of purchase, source used to obtain donation value**)
 - **Sch C: Small Business** for on-base home day care sponsored through the CDC. (Income, expenses, etc.)
 - **Sch E: Rental Property:** We will prepare returns with **one** rental. (Rental income, expenses, 1099 mortgage interest, real estate taxes, depreciation.)
- **Other Receipts/Documents:**
 - Childcare expenses: Must include name, address & tax ID of provider.
 - Alimony: received it, amount. If you paid it, amount and SSN of ex-spouse. 2018 and prior years.
 - Paid receipts for college tuition, books, lab fees, etc. (1098T required, yearly statement from college, receipts for books.)
 - 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, or you are unsure about.