MEDIA ADVISORY

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The U.S. Army Reserve's Premier Training Center for the Western United States

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Fort Hunter Liggett, Camp Parks Income Tax Assistance with the Staff Judge Advocate at the Presidio of Monterey

FORT HUNTER LIGGETT, Calif. –Free income tax assistance is available for all active duty and retired service members, family members, and DA Civilian Employees, as well as Reserve Component Service Members living in the South Monterey County and San Luis Obispo County area through several resources.

This year, to support the team at both FHL and Camp parks, the Combat Support Training Command is offering a three-tiered process to help you in addressing your income tax needs:

First tier of assistance comes from Militaryonesource.com:

Militaryonesource.com will provide the first line of services for our community. This is a software package which they are offering free to qualified users. The militaryonesource.com site requires users to register, but that is a quick and easy process -- a user just has to do is identify him/herself as belonging to the military community (service member, retiree, family member, civilian), provide a user name and password, and your e-mail address (best to use your AKO @army.mil or your military work address @conus.army.mil address to verify your connection with the military). The entire registration process takes roughly five minutes or less.

Second tier comes from Fort Hunter Liggett Legal Office:

If a user has questions while using the software available on militaryonesource.com, you can visit or call the Installation Legal Office at 381-386-2898. Our income tax paralegal volunteer will work with users to respond to your needs and ensure you have the information required to complete the maximum number of returns through the militaryonesource.com software. For our Camp Parks users, this service will be available by phone (again, 381-386-2898), where we can help you through issues to help you complete your tax returns on-line.

We estimate that 90% of all users will be able to file their returns after Tiers 1 & 2.

Third tier comes from Presidio of Monterey Legal Office:

For probably fewer than ten percent of filers in our communities, income tax support for more complicated returns will be available through the legal office and Presidio of Monterey. Their tax office is located in Building 254, off Patton Ave at the bottom of Soldier Field on the Presidio of Monterey. Our FHL income tax paralegal volunteer will act as Command Point of Contact to coordinate demand for services from the tax center at the Presidio, and to schedule such users for appointments. You can choose to get your name on a list for van transportation to the Presidio, or you can ask her to arrange

DO NOT PAY FOR A SERVICE YOU ARE ENTITLED TO GET FOR FREE!

Last year, the Tax Center at the Presidio of Monterey prepared 980 federal and state returns, saving service members over $227,000 in filing and preparation fees alone. Tax refunds to Soldiers and family members totaled more than $10 Million!

This year, after only four weeks of operation, they have prepared over 400 federal and state returns, already saving service members over $95,000 in filing fees this year!

Tax preparation is accomplished by utilizing a combination of personnel physically located in the Presidio's VITA Tax Center. This tax preparation is a no-cost service. The tax center at Presidio of Monterey can complete and electronically file federal and state tax returns for both the current and prior years. Electronically filing the returns will ensure that a federal refund due is directly deposit within 7 to 10 days. The Presidio's Tax Center can also prepare amended returns for both federal and state returns when necessary.

for an appointment for you to travel to the Presidio on your own schedule and at your own expense, if the group van is not convenient for your schedule.

The Presidio's Tax Center offers only limited walk-in service during the tax season, on a space-available basis, so an appointment arranged through our income tax paralegal volunteer in the FHL Installation Legal Office (381-386-2898) is strongly encouraged.

DOCUMENTS TO HAVE ON HAND PRIOR TO STARTING

Prior to going to www.militaryonesource.com, users should assemble as many of your tax-related documents as you can prior to starting. Here is a **Presidio Tax Center Checklist** for the documents you will most likely need:

[ ] Your previous year's tax return
[ ] Social Security numbers for you and all dependents
[ ] Your bank routing number and account number for direct deposits (these can be found on the bottom of your checks, but not on a deposit slip!).
[ ] W-2 forms: Wage statements for you and any wage earners your will be filing for
[ ] 1099-R: Pension/IRA statements
[ ] 1099-INT: Interest statements for checking/savings accounts, CDs, etc. (from your bank/investment broker)
[ ] 1099-DIV: Dividend statements (from your bank)
[ ] 1099-MISC: Non-employee compensation, other income, rental income
[ ] 1098-G: for previous year state tax refunds (taxable only if you itemized), gambling winnings, or debt forgiveness.
[ ] Social Security statements
[ ] Statement from each of your daycare providers, including their name and address, employer identification or Social Security number and total amount paid for each of your children.
[ ] College or graduate school statement of tuition paid and scholarships received on a 1098-T. If you didn't receive one, call your school and/or get one online.
[ ] Interest statements from all student loan providers (if you paid interest on student loans).
[ ] Amount(s) contributed to your traditional or Roth IRA's.
[ ] If applicable, a copy of divorce decrees and Form 8332 signed by the custodial parent (this is a must!)
[ ] If you sold any stocks or Mutual Funds during the tax year, you will need:

- The 1099-B or broker's statement(s) reflecting the date and gross proceeds (sales price).
- The initial purchase date(s) and the initial cost or basis of the investment.
- If you have numerous buys and sells (AKA Day-traders), you must summarize the totals and break them down into short and long term gains/losses.

Note: Not having the initial cost basis information for your investments is one of the primary reasons for delaying the completion of your return. Contact your broker or locate your original purchase/confirmation statements if they are not provided on your 1099-B.

Schedule A. Itemized Deductions:
If you are reasonably sure you have total expenses of more than about $11,000.00 in the following expense areas if you're filing Married Filing Jointly (MFJ) or $5500.00 if you're filing single (S), you will need to bring statements reflecting:

[ ] Form 1098, or year-end mortgage statement: Total home mortgage interest and real estate taxes paid.
[ ] Any additional state tax you paid with last year's return.
[ ] Any personal property taxes paid as shown on your DMV registration.
[ ] Any unreimbursed medical expenses and prescription drugs
[ ] Any charitable donations made
[ ] For non-cash donations valued at more than $500 each, you will need the name and address of the organization, date of donation, and fair market value of items
[ ] Unreimbursed Business Expenses
[ ] If Pennsylvania is your Home-of-Record, bring in a copy of your orders to prove you were in California

Your W-2 forms are available on-line now from MyPay through AKO, and many banking and mortgage documents are also available on-line as well, so if you finds particular document is missing, you can often open another window on your computer to retrieve the missing document (from MyPay, your bank, etc.).

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