

Fort Lee Tax Center

THE TAX CENTER IS NOW LOCATED IN BLDG. 5209, 910 20TH STREET,
JUST BEHIND THE WOMEN'S MUSEUM.



The Tax Center will provide customer support and prepare federal and state returns from 5 February to 17 April 2018. Any tax-related questions or issues outside of this period should be directed to the Fort Lee Legal Assistance Office, Bldg. 8135, 701 27th Street, (804) 765-1500. For tax assistance during the FY18 filing season, please stop by the Tax Center in person or call (804) 734-5732.

During the tax season, we are open Monday - Friday. 8:30 a.m. - 5 p.m. except for federal and training holidays. Walk-in clients are served without appointments from 1-5 p.m. on Tuesdays and Thursdays. Walk-in services are reserved for those with simple tax returns. Services for all other returns and times are by appointment only. Taxpayers needing assistance may make appointments in person or by phone.

Due to the high volume of patrons seeking services, the Tax Center may not be able to schedule your appointment for an extended period of time. As a result, those with simple tax returns are encouraged to take advantage of free online self-preparation services, such as those available through *Military OneSource* or the IRS' Free File system.*

The Fort Lee Tax Center's mission is to serve eligible patrons by removing the burden of hiring commercial tax preparers and saving time and money for our clients. The Tax Center offers free preparation and e-filing of federal and state returns. All of our preparers are trained and certified by the IRS to facilitate efficient and accurate tax preparation. In fact, the training is essentially the same as that received by any other non-CPA commercial tax preparer. The below information will assist in determining eligibility and reducing the wait time for your return.

- Who is Eligible
 - All active duty personnel and their dependents
 - Reservists on active duty more than 29 days and their dependents
 - Military retirees and their dependents

- Scope of Services

*No sponsorship or endorsement is intended or implied.

- The Fort Lee Tax Center provides form preparation services for 2017 tax returns and amends tax returns for certain prior years.
- The Fort Lee Tax Center will NOT prepare your taxes if any of the following apply:
 - You have self-employment income (e.g. Uber, TaskRabbit, AirBnB, Mary Kay)
 - You have income from more than one rental home
 - You have more than 10 stock or mutual fund sales
- What to Bring
 - Copies of your most recent federal tax return (copies may be requested at *irs.gov*)
 - Military ID Card
 - Your Social Security card and those of your spouse and dependents
 - All W-2 and 1099 forms
 - Any other tax forms received
 - SSN and EIN for each child care provider if applicable
 - Voided check with bank routing number and account number for direct deposit
 - Information documenting alimony (divorce decree or separation agreement)
 - If married and filing jointly, both spouses must be present, unless the present spouse has signed Power of Attorney for filing the taxes
- Specific Military Issues:
 - Disability Pay – Disability pay is not considered as taxable income.
 - TDY Pay – TDY pay is a non-taxable benefit to the extent it does not exceed TDY expenses. Taxpayers are generally not required to report amounts received as reimbursement for TDY.
 - Extension for filing – Military serving in a currently recognized combat zone (including Afghanistan, Iraq, and Kuwait) have up to 180 days following the date of their return to file taxes. Soldiers serving in a currently recognized combat zone during the tax season also will be entitled to an additional extension.
- Speeding Up Returns:
 - This section contains links to websites not maintained by the U.S. Government, the Department of Defense, or the U.S. Army. No sponsorship or endorsement is intended or implied.
 - When you arrive at the Tax Center, you will be asked to fill out a Form 13614-C. If you wish to save time during your visit, please click the link below (or copy and paste into the address area of your internet browser), print the form and fill it out in its entirety before arriving.
 - Form 13614-C – Intake/Interview and Quality Review Sheet
 - <https://www.irs.gov/pub/irs-pdf/f13614c.pdf>
 - For those filing jointly with a spouse when the spouse is not present for the appointment, a Power of Attorney is required. The below Power of Attorney may be used, or one may be prepared for you at the Client Services Division of the Office of the Staff Judge Advocate, 701 27th Street, Bldg. 8135.
 - Form 2848 – IRS Special Power of Attorney
 - <https://www.irs.gov/pub/irs-pdf/f2848.pdf>