

Filing Assistance Program

Do you have to file a tax return?

1996

Use this worksheet when your only taxable income for 1996 was from one or more of the sources listed below. Enter the amount of each item below.

| | |
|---|----------|
| Wages, salaries, tips | <u>1</u> |
| 2 Taxable interest income | <u>2</u> |
| 3 Dividend income | <u>3</u> |
| 4 Taxable refund (state and local income taxes) | <u>4</u> |
| 5 Taxable retirement income (Pension, Annuity, IRA Distribution) | <u>5</u> |
| 6 Other taxable income | <u>6</u> |
| 7 TOTAL GROSS INCOME . . . (Add lines 1 through 6). | <u>7</u> |

If line 7 is less than the total gross income amount shown in the chart below, a Federal tax return does not have to be filed. The chart below is to be used only for individuals who cannot be claimed as a dependent on another person's tax return.

Even if you do not otherwise have to file a return, you should file one to get a refund of any Federal income tax withheld. You should also file if you can take the earned income credit.

1996 Filing Requirements for Most Taxpayers

| Filing Status | Age * | Total Gross Income ** | Check One |
|---|--------------------|-----------------------|-----------|
| Single | Under 65 | \$6,550 | |
| | 65 or Older | \$7,550 | |
| Married, Joint Return *** | Under 65 (Both) | \$11,800 | |
| | 65 or Older (One) | \$12,600 | |
| | 65 or Older (Both) | \$13,400 | |
| Married, Separate Return | Any Age | \$2,550 | |
| Head of Household | Under 65 | \$8,450 | |
| | 65 or Older | \$9,450 | |
| Qualifying widow(er) with dependent child | Under 65 | \$9,250 | |
| | 65 or Older | \$10,050 | |

* If you turned age 65 on January 1, 1997, you are considered to be age 65 at the end of 1996.

** You must file a return if your gross income was at least the amount shown in the "Total Gross Income" column. Gross income means all income you received in the form of money, goods, property, and services that is not exempt from tax, including any gain on the sale of your main home (even if you may exclude or postpone part or all of the gain).

*** If you didn't live with your spouse at the end of 1996 (or on the date your spouse died) and your gross income was at least \$2,550, you must file a return regardless of your age.

Complete the portion below then detach this section at the perforation for IRS use.

Mail this detached section to IRS, P.O. Box 21057, Philadelphia, PA 19114.

| | | | | |
|--|-------|----------|--|--|
| Name of Person Assisted (Use IRS mailing label or print) | | | Your social security number : : : : : : | |
| If joint return, spouse's full name | | | Spouse's social security number : : : : : : | |
| Address | | | <input type="checkbox"/> TCE <input type="checkbox"/> Other <input type="checkbox"/> VITA Site no. _____ | |
| City | State | ZIP Code | | |