PRE-FILING CHECKLIST

BEFORE YOU ARRIVE AT THE TAX CENTER…

- Are eligible for our services?

  - Services are provided to active duty personnel, a military dependent, or retiree with a DOD-issued military ID.

  - We can file most standard returns, but if you plan to report multiple rental incomes, complex capital gains, business losses, etc., your tax return is outside our scope of services and we cannot prepare it for you. More information about eligibility is available on our website.

- Gather the following materials:

  - Your military ID;

  - **Social Security Cards for you, your spouse and all family members** you wish to claim as dependents:
    - **Please understand that this is an IRS requirement to maintain our license and operate the Tax Center. It must be enforced, no exceptions.**

  - All W-2 forms for the past year;

  - A copy of last year's income tax return:
    - It is exceedingly important that we are able to evaluate last year's tax return. If you have rental property, we recommend bringing the past few years' income tax returns.

    - If you do not have a copy, you may use form 4506-T to request one from the IRS, available at IRS.gov.

  - If you have made any charitable contributions, paid for daycare, or paid for education, gather the receipts and records of your expenses (we cannot deduct out-of-pocket expenses without records);

  - Statements for real estate taxes, loan interest, and other deductible expenses;

  - Form1098 and Form 1099 for education and miscellaneous income.

  - Any other forms, receipts, or information that you believe may assist us in getting you the best result.

- Print and fill out the Client Intake Form - Doing so before arriving at the Tax Center will substantially reduce your wait time.

- Priority is given to active duty personnel in uniform. While each client will be seen as quickly as possible, we instituted this policy to ensure we are taking care of those individuals for whom the services are intended first, and so that they can return to work as soon as possible. Our mission is to provide this service to Marines at minimal consequences to them, their commands, and their duties.

- Are you married and filing jointly? Both spouses must sign the return -- unless a signed Power of Attorney which specifically includes the authority to file income tax returns on behalf of your spouse is presented.

- Would you like to receive your refund in the next few days? Bring a voided check, your checkbook, or routing number and bank account.

- If you have children, please arrange for child care. Children may wait with you, however, some returns may take several hours to prepare and our experience is that children do not enjoy the wait. Accordingly, it is <u>highly recommended</u> that you arrange for child care instead of bringing your child or children with you.

- Our busiest hours are during the noon hour and near the end of the business day (1630). Try to expedite your visit by avoiding those peak times. Also, do not wait until the last day of Tax Season or at the close of business to file your return. High volume often leads to longer wait times.

- Persons who are having a tax return e-filed must be present to sign the tax return and the e-file authorization. The Tax Center will not allow anyone to take our documents off premises. We will be as accommodating as possible, but in order to ensure compliance with IRS requirements and to ensure the safety of the information in your tax returns, a taxpayer and spouse will be required to be physically present in the office (although it can be at different times).

- The Tax Center is located at 3095 Roan Street, Marine Corps Base Quantico. Park in the Legal Assistance parking lot, adjacent to the building. Follow the signs and enter the Tax Center through the rear door (facing the railroad tracks). The Tax Center <u>cannot</u> be accessed through the front of the building; you will be redirected to the back door entrance.