

FORT BUCHANAN TAX ASSISTANCE SERVICE CENTER

FREE TAX PREPARATION

WHO IS ELIGIBLE TO RECEIVE THE SERVICE

The Tax Assistance Service Center will help in the preparation of tax forms to eligible customers – Active Duty and Reserve personnel from all uniformed services, Retirees and DoD Federal employees on transportation agreement.

WHAT DOCUMENTS YOU MUST BRING:

Proof of eligibility such as: Identification card for yourself and/or your spouse, Social Security Cards (for self, spouse and dependents), Birth Certificate or Passport for dependents. Other supporting documents include receipts for expenses and in case of filling a claim for, for example, PCS move reimbursement, you must bring copy of PCS orders. Current year tax package. All Forms W-2 and 1099's. Information from other income. Information for all deductions/credits. Copy of last year's tax return. Proof of account for direct deposit of refund (e.g. voided check).

IMPORTANT INFORMATION

If you earned \$20,000 or less, you can file a US tax form without PR tax form because you are excepted from filing taxes in PR.

If you earned \$20,000 or more, you must file a PR tax form first and then the US tax form. You must also bring copy of last year's PR tax form.

At the Tax Assistance Service Center we will prepare:

- Form 982
- Form 1040EZ, 1040A, 1040
- Schedules A, B, D, EIC, M, R, SE
- Form 1040 – V
- Form 1040 – ES
- Form 2441 (child and dependent care credit)
- Form 5329 (part 1)
- Form 5405
- Form 8863 (education credits)
- Form 8880 (credit for qualified retirement savings contributions)
- Form 8812 (additional child tax credit)
- Form 8888 (direct deposit)
- Form 8889 (health savings accounts)
- Schedule C-EZ
- Schedule C (limited)

At the Tax Assistance Service Center we will NOT prepare:

- Schedule C with losses
 - Complicated & advanced Schedule D (capital gains and losses)
 - Schedule E (rental income and loss (Military only))
 - Form SS-5 (request for social security number)
 - Form 2106 (employee business expenses)
 - Form 3903 (moving)
 - Form 8606 (non-deductible IRA)
 - Form 8615 (minor's investment income)
 - Form SS-8 (determination of worker status for purposes of federal employment taxes and income tax withholding)
- Please see a professional preparer for assistance with complicated returns.

HOURS OF OPERATION: Monday – Friday 7:30 a.m.– 4:30 p.m.

FOR APPOINTMENTS PLEASE CALL: (787) 707-3636 or 3637

Other telephone numbers are: (787) 707-3639, 3640

Location: Bldg. 176 - Old TRICARE Office across from the Welcome Center (Bldg. 152)