

## **2022 APG Tax Program**

### **Required Documents & Instructions**

Tax preparation for tax year 2021 will only be provided to Active Duty Service Members assigned or attached to APG in the grades of O3 and below and their dependent spouses. Services will be provided by appointment only on a Drop-Off basis – tax returns are not prepared while you wait. No face-to-face tax preparation will be provided for the 2022 Tax Season.

Tax services will require a two-appointment process: first appointment – document review and drop off; second appointment – review of tax return(s) and signing. During the first visit, a CSD tax advisor will perform a review of your individual tax documents to determine eligibility for tax preparation at a later date. Eligible requests will be chronologically placed in queue and prepared in order of its acceptance.

You should expect a delay in processing times of several weeks due to additional communications and administrative requirements under this process. We ask for your patience and cooperation. Repeated status inquiries slow processing times. If your financial situation demands an expedited return of your tax refund, you should consider an off-post tax preparation agency to accommodate your needs.

- **You must call 410-278-1583 to schedule an appointment for the document review and drop off.**

Prior to calling and scheduling your appointment, you must first complete the below listed documents required by the IRS and CSD (these questionnaires will be extremely helpful in gathering all the documentation necessary to file an accurate return and are required to receive our tax services):

- 1) **Determination for Eligibility of APG Income Tax Services.** Answering “Yes” to any of these tax related questions places your tax return outside our scope of service and we may not be able to assist you. Please call and ask to speak with our tax advisor prior to completing any of our required forms.
- 2) **APG Client Agreement and Supplemental Questionnaire.** Review, complete, sign and date this form next if you are of qualifying military status and answered “No” to all of the tax related questions presented on the “Determination for Eligibility...” document. Should you need preparation of your state tax return, you must also complete the State Income Tax Information section.
- 3) **IRS Form 13614-C Intake/Interview & Quality Review Sheet.** This form is required by the IRS and must be completed to receive federal tax preparation.

#### **FIRST Appointment: Review/Drop Off**

- Bring the fully completed aforementioned documents and all your personal tax documents as provided in the Documents List (next page). Please remove personal tax statements from their mailing envelopes. We recommend keeping your originals and providing us with copies. The CSD cannot make copies on your behalf.
- Please be prepared – available appointments are limited. Missing documents will prevent your request from being accepted and additional “drop off” appointments are not guaranteed.

#### **SECOND Appointment: Finalization/Signatures**

- Our tax preparer will contact you by phone during the preparation process as necessary.
- Once the return is complete, the tax preparer will discuss your return with you over the phone and arrange for the in-person finalization/signing process with you.
- If eligible for electronic filing, we will electronically file the returns with the IRS and state for you. Returns ineligible for e-filing must be mailed via postal mail to the appropriate agency by the taxpayer.

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#### **DOCUMENTS LIST**

NOTE: Tax documents needed depend upon each individual's tax situation. Remember, most income is taxable, including unemployment income, refund interest, income from gig economy, virtual currencies, etc.

- APG Client Agreement & Supplemental Questionnaire (Federal & State information)
- IRS Form 13614-C (Intake/Interview & Quality Review Sheet)
- Valid military identification card
- Copy of your current military orders (Active Duty assigned to APG)
- Power of attorney signed by the spouse if either party plans to sign the spouse's name on a joint tax return
- This form (Required Documents & Instructions) if not providing Recovery Rebate Letters 6419 and 6475
- Your personal tax documents:
  - Copy of your last tax return (2020 federal and state(s))
  - W-2 statements (from all employers in 2021 and any miscellaneous military income, i.e. DITY move)
  - Form 1099-INT-DIV-B-R (stating interest, dividends or capital gains, distributions from pensions and IRAs - If your bank does not issue Form 1099 under \$20 or less, you are required to obtain and report the annual amount reflected on your December statement in excess of .50 cents).
  - Social security cards for yourself, spouse, and all dependents (if not providing last year's tax return)
  - Child care expenses and provider identification and address (provide separate totals for each child)
  - Blank check with your routing and account number for a refund directly deposited into a bank account (or provide written information on the APG Client Agreement & Supplemental Questionnaire)
- For those who itemize deductions or own a home that is rented to others, bring materials such as:
  - Mortgage interest statements (Form 1098) and Property Tax statements if not reported on Form 1098 (paid through escrow)
  - Medical receipts (total monetary amount claimed)
  - Rental reports (no more than one rental property, no first year depreciation or depreciation of assets)
  - Investment statements establishing sales price and cost basis of stock (certain limitations)
  - Charitable contribution receipts (organization name and address, date of each donation and monetary value)

**Recovery Rebate Credits.** Your tax request will not be accepted for preparation unless the Recovery Rebate information has been provided. This information is subject to IRS Special Processing – if the amounts do not match the amounts from IRS letters 6419 and 6475, the processing of your return will be delayed. If these credits apply to you and you did not receive an IRS letter - access the portals below to obtain the information and enter it here:

- **Letter 6419, 2021 Advance Child Tax Credit.** Eligible taxpayers who received advance Child Tax Credit payments should file a 2021 tax return to receive the second half of the credit. Eligible taxpayers who did not receive advance Child Tax Credit payments can claim the full credit by filing a tax return.
  - You can check the amount of the payments you received by using the [CTC Update Portal](#) available on IRS.gov. **Amount Received:** \$ \_\_\_\_\_
- **Letter 6475, Third Economic Impact Payment.** Most eligible taxpayers already received their stimulus payments. Taxpayers who are eligible for RRC must file a 2021 tax return to claim their remaining stimulus amount.
  - You can check the amount of the third payment you received by clicking on [Recovery Rebate Credit \(RRC\)](#) (available on IRS.gov). **Amount Received:** \$ \_\_\_\_\_