Tax Assistance Program at the Presidio of Monterey
(updated Aug 2012)

From January through April of each year the Office of the Staff Judge Advocate, Legal Assistance Branch provides a Volunteer Income Tax Assistance (VITA) Program for all active duty and retired service members as well as their families. Tax preparation is accomplished by utilizing a combination of personnel physically located in the VITA Tax Center and many other satellite locations in the various local military units. These satellite locations are manned by Unit Tax Advisors (UTAs). These satellite locations provide the military members a very fast and convenient way to have their taxes prepared while allowing the VITA Tax Program to reach more members than would be possible if all returns were prepared at the VITA Tax Center office.

This tax preparation is a no-cost service. We complete and electronically file Federal and State tax returns for the current year. Prior year returns must be mailed in by the taxpayer. Electronically filing the returns will ensure that refunds due is usually directly deposited within 7 to 10 business days. The Tax Center can also prepare amended returns for both Federal and State returns when necessary.

The staff of the VITA Tax Program is comprised of a combination of 5-10 permanent DLI civilian employees, military personnel, a temporary civilian hire and other volunteers. All of the preparers must attend a two-week VITA training class given by IRS and California Franchise Tax Board (FTB) instructors. At the completion of the training the preparers must pass a VITA certification test before they are allowed to prepare returns. While the VITA Program Tax Center provides most of the more common tax preparation services needed, it may also provide information for preparation services available for the more difficult or complex returns that are beyond the capability of the VITA Tax Center.

Just prior to and during the tax season, the Office of the Staff Judge Advocate conducts an extensive base wide promotional campaign to advertise the VITA Tax Program. This program consists of flyers, email notices, briefings, postings, etc. This promotional program gives detailed information on how, when and whom to contact for free tax preparation. The Tax Center offers limited walk-in service during the tax season on a space-available basis, so appointments are strongly encouraged.

In preparing for your appointment it is important that you come to the appointment with all the documents necessary to complete your return. To assist you in that preparation a check list is provided.

THE TAX CENTER CHECKLIST:
DOCUMENTS NEEDED TO PREPARE YOUR RETURN

[ ] Previous year tax return
[ ] Social Security cards for you and your dependents
[ ] Your bank routing number and account number for direct deposits (these can be found on the bottom of your checks but not a deposit slip!). A voided check (original or a copy) or printout from MyPay is preferred.
[ ] W-2's: Wage statements
[ ] 1099-R's: Pension/IRA statements [ ] 1099-INT's: Interest statements for checking/savings accounts, CDs, etc.
[ ] 1099-DIV's: Dividend statements
[ ] 1099-MISC's: Non-employee compensation, other income, rental income
[ ] 1098-G showing state tax refunds (taxable only if you itemized) gambling winnings or debt forgiveness.
[ ] Social Security statements
[ ] Statement from each of your daycare providers, including their name and address, employer identification or Social Security number and total amount paid for each of your children.
[ ] College or graduate school statement of tuition paid and scholarships received on a 1098-T. If you didn't receive one call the school and/or get one online.
[ ] Interest statements from all of your student loan providers (If you paid interest on student loans)
[ ] Amount(s) contributed to your traditional or Roth IRA's.
[ ] A copy of your Power of Attorney if spouse is unavailable to sign
[ ] If you are divorced, bring a copy of your divorce decree and Form 8332 signed by the custodial parent (this is a must!)
[ ] If you sold any stocks or Mutual Funds during the tax year, you will need to bring in: The 1099-B or broker's statement(s) reflecting the date and gross proceeds (sales price). You will also need to know the initial purchase date(s) and the initial cost or basis. If you have numerous buys and sells (AKA Day-trader) and are outside the scope of the VITA program. Note: Not having the initial cost basis information is one of the primary reasons for delaying the completion of your return. Contact your broker or locate your original purchase/confirmation statements if they are not provided on your 1099- B.
Schedule A. Itemized Deductions:
If you are reasonably sure you have total expenses of more than about $11,600.00 when Married Filing Jointly (MFJ) or about $5800.00 when filing single (S) in the following expense areas, you will need to bring statements reflecting:
[ ] The amount of home mortgage interest and real estate taxes you paid on either form 1098 or your yearend mortgage statement.
[ ] The amount of any additional state tax you paid with last year's return.
[ ] Information for any personal property taxes paid as shown on your DMV registration.
[ ] Information for any unreimbursed medical expenses and prescription drugs
[ ] Information for any charitable donations made
[ ] If you made non-cash donations valued at less than $500, you will need the name of the organization, and fair market value of items.
[ ] Unreimbursed Business Expenses
[ ] If Pennsylvania is your Home-of-Record, bring in a copy of your orders to prove you were in California.