



## BUDDY-TO-BUDDY VOLUNTEER SUPPORT CALL

January 18-19, 2016

Buddy-to-Buddy is a peer-to-peer outreach program that trains veterans to provide peer support and linkage to needed resources for Michigan Post-9/11 service members and veterans. Visit us at [www.buddytobuddy.org](http://www.buddytobuddy.org) or reach us at [buddytobuddyvvp@umich.edu](mailto:buddytobuddyvvp@umich.edu) or 1-888-82-BUDDY. Every week, Buddy-to-Buddy holds Support Calls for its 120+ volunteers, sharing resources and bringing guest speakers to provide information on topics of interest and available services.

### *Guest Speaker Presentation*

## **Tax Preparation Assistance for Veterans**

### **Guest Speaker**

Sierra Sharpe

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### **Guest Speaker Summary**

- Services available to both civilians and military
  - IRS Volunteer Income Tax Assistance Program (VITA)
    - For individuals with income less than \$54,000 annually, or who are disabled, elderly, or have limited English.
    - IRS-certified volunteers provide **free** basic income tax preparation with electronic filing.
      - Volunteers have varying levels of certification. One of the highest levels is a military certification. These volunteers are equipped with the knowledge to properly prepare a potentially-complicated military return. Service members should self-identify as such in order to be paired with a volunteer at that level.
    - To locate a site near you, visit the website or call 800-906-9887. Sites are usually held in local libraries, community centers, or other public areas.
      - At select sites, individuals will also have the ability to self-prepare their taxes for free using web-based software with a volunteer present to guide you through the process if needed.
    - <https://www.irs.gov/Individuals/Free-Tax-Return-Preparation-for-You-by-Volunteers>

- IRS FreeFile
  - This program makes name-brand electronic tax preparation and filing free for individuals who make \$62,000 or less annually.
  - Individuals can use the online tool to select the program that best meets their needs.
  - Individuals in some states will also qualify for free preparation and filing of their state return, in addition to the federal return.
  - For individuals who make more than \$62,000 annually, there are free electronic forms available.
- Military-specific services
  - Turbo Tax
    - Free edition & Deluxe edition are free for E-1 to E-5
    - Discount available for E-6 and above
    - Visit [www.turbotax.intuit.com/personal-taxes/online/military-edition.jsp](http://www.turbotax.intuit.com/personal-taxes/online/military-edition.jsp)
  - Military OneSource
    - Free financial counseling
    - Free tax consultations
    - Free tax preparation and filing
    - Eligibility: Anyone currently serving in any branch, in any component, and anyone who was discharged from service within the last six months.
    - Call 800-342-9647 or visit [www.militaryonesource.mil/financial-and-legal/taxes](http://www.militaryonesource.mil/financial-and-legal/taxes)