



Nassau & Suffolk Veterans



2016

# Free Tax Preparation Day

**Saturday, March 4, 2017**  
**10:00am-1:00pm**

**Nassau County Veterans Center**  
**970 South Broadway, Hicksville NY 11801**

For directions call: 516-348-0088

- IRS Certified Veterans will be on hand to prepare your return confidentially
- Time slots are limited, so please book your appointment as soon as possible

Appointment Required

- To book appointment call: (631) 687-4879

**Paula Mucci, AFC®**  
**Financial Coach**

Free Tax preparation will be provided by AARP-IRS Certified Volunteers.

Veterans of all ages will be served

# For Tax Preparation:

## What to Bring (Besides your wonderful self!):

- Copy of the previous year's tax return
- Picture ID (driver's license)
- All income documents: W-2, 1099, 1098 - any other documents showing additional income
- All Forms 1095-Health Ins. Statements
- Information for credits that you are claiming (Student loan interest, Education credit)
- Social Security card (or ITIN) for you, your spouse and dependents
- Birth dates for you, your spouse and dependents on the tax return
- To file taxes electronically on a married-filing-joint tax return, both spouses must be present to sign the required forms.
- Other applicable tax-related documents, such as: interest statements, federal loan documents, retirement statements, list of organizations to which you made charitable donations, etc.
- Blank check (to verify direct deposit information to your refund)

## Who Is Eligible to Attend this Event:

- Veterans of all eras and their spouses are welcome
- A Guardsman or Reservist Member who served on active duty at some point and is not currently on active duty
- Spouse of a Fallen Servicemember and their children

## AARP Cannot Prepare:

- Schedule C if expenses exceed \$25,000
- Complicated Schedule D (Capital Gains and Losses) without Proper Paperwork
- Schedule E (Rental Property) with expenses, including depreciation (exception: returns for military members only, prepared by a counselor who has been certified to do military returns provided another military certified counselor is available to quality review the return)
- Schedule F (Farm Income)
- 2106 (employee Business Expenses)
- 3903 (Moving Expenses)
- 8615 (Minor's Investment Income)
- Portions of Schedules A and B that are not included in our training
- Schedule K-I that involves depreciation or deductible expenses
- Other rental income or business income

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