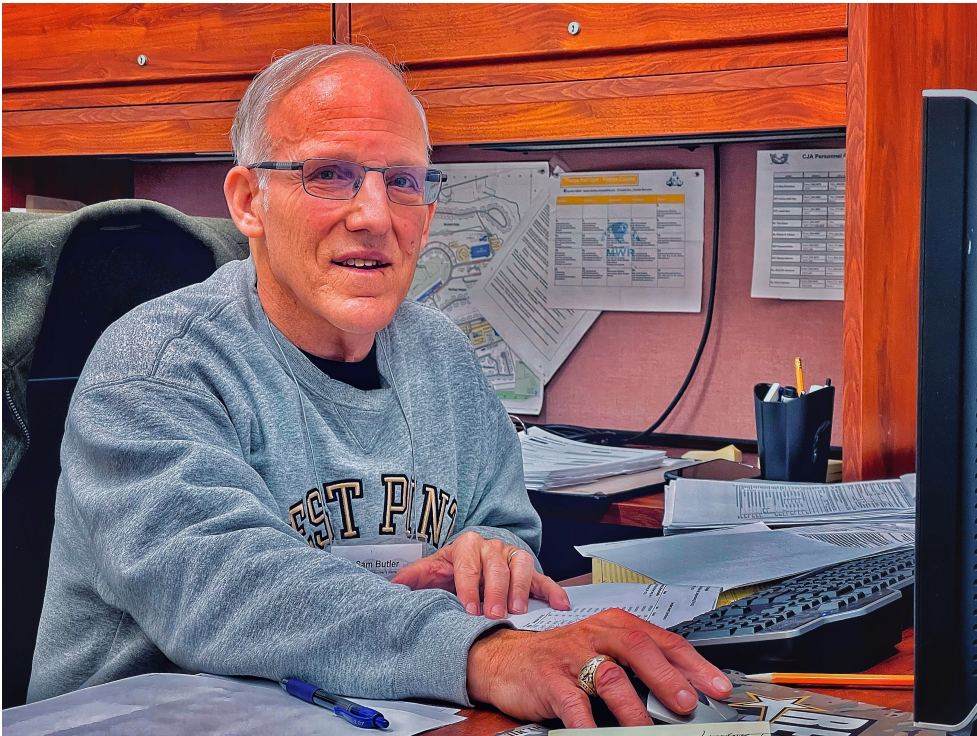


Carlisle Barracks all-volunteer VITA Tax Assistance Center opens

By Curt Keester 15 February 2022



Sam Butler, VITA Tax Assistance Center volunteer, works to prepare a 2021 tax return for a Carlisle Barracks Community member, Feb. 15, 2022. This year's volunteers are Sam Butler, Tom McCormick, Edward Murdock, Pamela Murphy, and John Tisserand.

CARLISLE BARRACKS, Pa. (Feb. 15, 2022) – The Carlisle Barracks all-volunteer Tax Assistance Center is officially open for the 2022 tax season.

The Tax Center is available to U.S. military enlisted personnel, warrant officers, company-grade officers (grades O-1 to O-3), and family members with a gross income below \$47,000 when filing single, or \$57,000 when filing jointly, and to retirees 75-years or older, or the widowed spouses of military members or retirees.

"We're delighted to once again provide the service members and families of our Carlisle Barracks Community with this All-Volunteer Tax Service," said Lt. Col. Jeannette Molina, Carlisle Barracks Garrison Commander. "This year's Tax Center will be a little smaller than years past, but we're happy to provide this vital service and contribute to the financial readiness of our service members and families."

Services are provided by appointment only and scheduled two weeks in advance. A new week's schedule opens every Monday. Appointments are based on volunteer availability and fill up fast. Clients can call between 8 a.m. and 4 p.m. at 717-245-3986, or stop by the Legal Assistance Office to schedule an appointment. You will need to fill out an Intake form upon arrival for your appointment.

For the Tax Center to better assist you, please bring the following documents to your appointment:

- Two forms of identification (i.e., Military ID card, driver's license, passport, or state-issued identification)
- All forms of income (i.e., W-2, 1099-DIV, 1099-G, 1099-INT, 1099-MISC, SSA-1099, etc.)
- Expenses (i.e., Student Loans/Tuition, Business, Child Care, Medical, Move, Charity, etc.)
- IRS Intake and Interview Sheet (emailed once an appointment is scheduled)
- Social Security cards for self and dependents (if applicable)
- Your bank's routing and account numbers
- Your 2021 state and federal return
- Form 8332 (If applicable)
- All receipts (If intending to itemize)
- Closing documents (If you purchased or sold a home)
- Investment and brokerage account documents
- Any documents reporting a withholding

In accordance with Executive Order 13991, DoD guidance, and Army War College and Carlisle Barracks policy, a universal indoor masking policy is in effect, regardless of vaccination status, for students, employees, and visitors.

This year's volunteers are Sam Butler, Tom McCormick, Edward Murdock, Pamela Murphy, and John Tisserand. "Their efforts make the Tax Center," said Kami Hertzler, Legal Assistant. "Without our volunteers, we wouldn't be able to offer the free tax services we do to our Carlisle Barracks community."

Although the volunteer staff is trained and certified, there are areas where their ability to assist is limited. These areas include but are not limited to international income, multiple rental properties, and the sale of a house in the tax year 2021.

"The last day of the Tax Center will be Apr. 15," said Capt. Matthew Byelich, Legal Assistance Attorney and officer in charge of the tax center. "We will not do electronic filing that day. It will all be paper. The reason being, if something were to get rejected, we wouldn't be able to track it."

Don't hesitate to contact the tax center with questions about required documents, eligibility for services, or other tax-related questions at 717-245-3986.

Alternate Resources to File Tax Return

All active-duty military members may prepare and file federal and state tax returns via Military OneSource at <https://www.militaryonesource.mil/financial-legal/tax-resource-center/miltax-military-tax-services>.

Others, including military retirees, may self-prepare their federal and state returns using commercial software available at the following IRS Website <https://www.irs.gov/e-file-providers/efile-with-commercial-software>.

The Volunteer Income Tax Assistance (VITA) grant program

The Volunteer Income Tax Assistance (VITA) grant program is an IRS initiative designed to support free tax preparation services for the underserved through various partner organizations. This service helps low to moderate-income individuals, persons with disabilities, the elderly, and limited English speakers file their taxes each year. IRS awards matching funds to these support organizations that offer free tax preparation services during the tax filing season at locations in all 50 states and the District of Columbia. In accordance with AR 27-2 para. 3-5(h)(2), Legal Assistance offices can assist eligible members with their taxes.

More VITA program information at <https://www.irs.gov/individuals/irs-vita-grant-program>.

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