

TAX HELP

1/2009

The INFO SERIES has been developed to provide you with general information. The descriptions do not describe the full extent of services covered. A call or website visit is recommended.

Where to get help –



Free income tax assistance is available for individuals with low-income, people with disabilities, non-English speaking taxpayers, and the elderly (60 years of age or older) if they are unable to prepare their own tax returns. Most sites are open from February 1 through April 10, 2009.

Volunteer Income Tax Assistance Program (VITA) Volunteers trained by the Internal Revenue Service and the Wisconsin Department of Revenue will prepare basic income tax returns. They will also help individuals who qualify for homestead credit or the earned income credit.

To locate the nearest site, call 1-800-829-1040 or
Web Site: <http://www.dor.state.wi.us/faqs/pcs/vita.html>

Taxpayer Counseling for the Elderly (TCE) Program. This program is supported by the American Association of Retired Persons (AARP) Foundation.

To locate the nearest site, call 1-888-227-7669 or
ARRP's Web site: <http://www.aarp.org/money/taxaide/>

What information to bring with you –

If you are meeting with a volunteer for help with 2008 taxes bring the following:

- Your State and Federal 2007 Tax Returns
- Proof of your income for 2008
- Interest and dividend statements from banks (Forms 1099)
- Social Security Records/Cards
- S.S.I. (Supplement Security Income)
- Must bring photo identification**

Wisconsin Homestead Filing bring:

(The maximum income allowed for filing Homestead is \$24,500.)

- Your 2008 Real Estate Tax Bill OR
- Certificate of Rent form(s), signed by your Landlord(s)
- Homestead information at:
<http://www.dor.state.wi.us/faqs/ise/home.html#home1>



Tax Credits and Deductions –

Earned Income Credit (EIC) Only about 75% of the eligible families take advantage of this credit. It is for working families with at least one qualifying child. The credit is based on the amount of your earned income.

Web site - <http://www.dor.state.wi.us/faqs/ise/eic.html>

Child and Dependent Care Credit – If you pay someone to care for either your dependent under age 13 or your spouse or dependent who is not able to care for themselves, you may be able to get a credit of up to 35% of your expenses. Internal Revenue Service Publication 503 – *Child and Dependent Care Expenses*- www.irs.gov is a full publication that explains what expenses can be deducted.

Wisconsin Homestead Credit – This is available to homeowners and renters. People that live in mobile homes or nursing homes that paid property taxes may also qualify. A Schedule H form is used and must have attached a completed Rent Certificate if renting or a copy of the 2005 property tax bill if you own your home. Web Site: <http://www.dor.state.wi.us/faqs/ise/home.html>

✓ All of these credits are refundable, which means even families that earned too little to owe income tax can get the credits. Households would receive all or part of their credit as refund checks.

Deductions for Medical Expenses – This will include deductions for medical expenses, payments for medical insurance, home remodeling, and transportation costs related to medical care. Internal Revenue Service Publication 502 – *Medical and Dental Expenses* - www.irs.gov is a full publication that explains what medical expenses can be deducted.

Impairment-Related Work Expenses – If you have work expenses due to a disability, they may be a deductible business expense. Examples are special transportation, assistive technology devices, assistants, etc. These also may be deductible for the purpose of calculating your Social Security benefits eligibility as well. Internal Revenue Service Publication 529 – *Miscellaneous Deductions*- www.irs.gov is a full publication that explains what work related expenses can be deducted.

Deductions for Business

The Work Opportunity Credit - This is a tax credit for businesses that hire individuals from certain targeted groups. Qualified hires include blind or disabled individuals who receive Supplemental Security Income (SSI) benefits or people who

have received services through Wisconsin Vocational Rehabilitation programs. Form-5884, Work Opportunity Credit.

Disabled Access Credit – A business may qualify for this credit for expenses to provide access to persons with disabilities under the Americans with Disabilities Act (ADA). These include not only wheelchair and similar access, but also include expenditures to allow blind individuals to access a business web site. Form- 8826, Disabled Access Credit.

Deduction to Remove Barriers - This is a deduction a business can take for making a facility or public transportation vehicle more accessible to and usable by persons who are disabled or elderly. Publication- 535, Business Expenses, chapter 8.

A great document that lists all possible deduction, credits, and where to get tax help-

Tax Highlights for Persons with Disabilities (Publication 907) is a publication put out by The Internal Revenue Service that provides a brief introduction to certain parts of the tax law of particular interest to people with disabilities and those who care for people with disabilities. Copies can be obtained by going to the web site <http://www.irs.gov/pub/irs-pdf/p907.pdf> , calling 1-800-829-3676, writing to Central Area Distribution Center P.O. Box 8903, Bloomington, IL 61702-8903, or checking your local library or Post Office.

The listings on this Info Sheet should in no way be construed to constitute an endorsement of a company, organization or its service, nor should exclusion be construed to constitute disapproval. The information that appears in this publication was obtained from the company/organizations listed above.



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(800) 378-9128 V/TTY

Kenosha Office

5727 6th Ave
Kenosha, WI 53140
(262) 657-3999 V/TTY
(800) 317-3999 V/TTY

Elkhorn Office

615 E. Geneva Street
Elkhorn, WI 53121
(262) 723-8181 V/TTY
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Alternative Format Available Upon Request