

Off-Season Tax Solutions for 2012

Problem: I need to file my taxes!

Solution:

- <http://turbotax.intuit.com/taxfreedom/> Allows you to file your federal taxes for free if you are in the military. It has free returns for some states, with other state returns costing about \$15 to file.
- <http://www.militaryonesource.com/MOS/FindInformation/Category/TaxFilingServices.aspx>. Register for Military OneSource and receive access to the H&R Block At Home Basic e-file tax return product. It allows free filing of federal returns and free filing of up to three state returns. It also offers a Military OneSource Tax Consultant by phone for tax-related questions or questions about using the the H&R Block At Home Basic product.
- Go to H & R Block in Seoul. The address is:
 - H&R Block
2nd Floor Car Wash Building
36-37 ITAWON 1-DONG
YONGSAN KU, SEOUL 140-201
PHONE: 02749-1040

Problem: I need copies of my tax returns!

Solution:

- If you had your taxes prepared at Camp Casey for the tax year 2011, 2010, or 2009, we might have a copy of those returns. Go to the Legal Assistance Office and fill out a request for a copy of your tax return. They will call you back within two working days to tell you if we found the copy or if we do not have them anymore. Please be sure to specify on the form whether you met with a tax preparer at Camp Red Cloud, Camp Stanley, or Camp Casey when you had your taxes prepared.
- If you had your taxes prepared someplace else, or you need a copy of a return from a different tax year, you must request copies from the Internal Revenue Service (IRS) by going to: <http://www.irs.gov/taxtopics/tc156.html?portlet=1> and following the instructions.

Problem: I received a scary letter from the IRS, and I don't know what to do!

Solution:

- **First**, call the phone number listed on the letter you received from the IRS to ask an agent questions concerning your issue. The IRS agent will only speak to YOU, not somebody else who is calling to ask questions on your behalf.
- **Second**, call the Taxpayer Advocate. The Taxpayer Advocate Service is a program through the IRS that offers free, independent, and confidential assistance to taxpayers unable to resolve their tax problems through normal channels or individuals experiencing a hardship. The Taxpayer Advocate Service helps individual and business taxpayers resolve problems with the IRS. If you are in Korea, call the Taxpayer Advocate at: 787-622-8940 or the toll-free number at: 1-877-777-4778.

(continued on reverse) →

- **Finally**, if you have already spoken to the IRS and the Taxpayer Advocate and you are still having problems, bring a copy of the letter, along with any relevant documents or tax forms, to a Legal Assistance Attorney to see if they can help. A Legal Assistance Attorney will only meet with you if you have already called the IRS and the Taxpayer Advocate. If the Legal Assistance Attorney cannot help, you will have to hire a tax attorney at your own expense.

Problem: I just got married to a non-U.S. Citizen. What do I need to do?

Solution: If you are filing a tax return jointly with your spouse, your spouse (and all dependents) will need either a Social Security Number (if they are eligible for one) or an International Tax Identification Number (ITIN) to identify them for income tax purposes on your tax returns.

- To apply for a Social Security Number, go to <http://www.ssa.gov/pubs/10096.html#2> and fill out the required forms.
- To apply for an ITIN, your tax preparer will complete the required forms for you at the time that you file your next tax return. An application for an ITIN must be submitted **with your tax return**, and not at any other time.

Problem: I just received my ITIN for my non-U.S. Citizen Spouse in the mail. What do I need to do?

Solution:

- File an amended tax return by using one of the tax preparation services, or do it yourself using an IRS Form 1040-X, available at: <http://www.irs.gov/formspubs/index.html>. List your family member's ITIN on the amended return wherever the return asks for that person's Social Security Number, with all of the other information remaining the same. You will need to submit a copy of your originally filed return along with the amended return. You will also need the original return to fill out the form for the amended return.
- Hold onto your ITIN forms (don't lose these!) and give them to your tax preparer the next time you have your taxes done. You can ask the preparer to put the ITIN on next year's return, and also file an amended return for last year.
- If you are going to the USA before February, you can hold onto your ITIN information and go to a commercial tax preparation service in the USA (such as H&R Block or Jackson Hewitt or whoever else prepares your taxes in the USA) and ask them to file an amended return for you. This will likely cost you money, but it never hurts to request a military discount.

Problem: I have been waiting for my tax refund forever, and I still haven't gotten my money!

Solution:

- For federal refunds: Use the IRS's "Where's My Refund" feature to track the status of your federal tax return by going to: <https://sa1.www4.irs.gov/irfof/lang/en/irfofgetstatus.jsp>. If that does not work, call the IRS Taxpayer Advocate at: 787-622-8940 or the toll-free number at: 1-877-777-4778.
- For state returns, call your state's Department of Treasury to ask them what the status of your refund is. **DO NOT ASK THE LEGAL ASSISTANCE ATTORNEYS.** They do not know where your money is!

(continued on reverse) →