

Dear Tax Client:

As in past years, clients are encouraged to utilize the Rock Island Arsenal Tax Center drop-off system, unless it's deemed necessary to meet with you personally regarding your tax issues prior to completion. Specifically, we ask that you drop off or email all documentation required to complete your 2012 tax return. When your return is complete and ready for signature, we will contact you to arrange a signing appointment. All Federal and State returns will be e-filed, unless special circumstances require paper filing. In order to complete individual Federal and State returns, clients must provide supporting documentation. A reminder to Iowa residents, a copy of your 2011 Federal and State return is required to complete your 2012 return (irrespective of residence, it is always advisable for clients to bring a copy or prior-year returns). Below is a suggested list of items to include in your drop-off packet:

- All W-2's,
- Social Security cards for each family member and dependents (these are not readable through email),
- 1099's (interest, dividends, state refunds, unemployment, retirement, SSA, etc), & 1098's,
- Documentation for stocks, bonds, capital gains and losses & distributions,
- Out-of-pocket education costs, student loans, or loan interest (you, spouse, or dependents),
- Child & dependent care expenses (SS # or EIN # is needed for the individual or group caregiver),
- Real estate taxes, mortgage interest, and mortgage insurance premiums,
- Sale of a home or repayment of the housing credit of 2008,
- Rental property (date of purchase, purchase price, date put into rental service, expenses),
- Moving expenses (paid out-of-pocket),
- Unreimbursed medical and dental expenses (Schedule A filers),
- Gifts to charity substantiating amounts claimed & name/ address of charity, (Schedule A filers),
- Unreimbursed job expenses, union dues, tax preparation fees, or safety deposit box costs (Schedule A filers),
- Vehicle registration costs (Iowa residents and Illinois residents that are Schedule A filers)
- Voided check for direct deposit

The Rock Island Arsenal Tax Center is located on the first floor of Building 390 in the Office of Counsel, Suite 102, Room 102B. Building 390 is a secure building and requires special access. Please call to make arrangements for materials to be dropped off. When you arrive, dial my extension on the courtesy phone outside the building and I will meet you at the door. We anticipate this to be another very busy tax season and ask your patience as we strive to complete your return in a timely manner. If you have any questions or concerns please feel free to contact me.

Sincerely,

Laura J. McSparin

Tax Clerk

AMSAS-GC Building 390, Suite 102, Room 102B

309 782-8327

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Office Hours 9:00 – 4:00