



## FLORIDA SENIOR LEGAL HELPLINE 1-888/895-7873

### Are you Prepared for Tax Season?

#### ***Beware of IRS Imposter Scams!***

• **Here's how they work:** You get a call from someone who says they're from the IRS and that you owe back taxes. They may threaten to sue you, arrest you, deport you, or revoke your driver's license if you don't pay right away. You're told to wire money or put money on a prepaid debit card and give the caller the card number. Or, the caller could say you have a pending refund and they need to verify personal information before sending it.

• **Here's what you should do: Do not send money or give any personal or financial information. Do not return a call from someone claiming to be with the IRS.** The real IRS initiates most contact through regular mail, delivered by the U.S. Postal Service. Only when there are special circumstances - such as when a taxpayer has an overdue tax bill and the IRS is seeking to secure a delinquent tax return or a delinquent employment tax payment - will the IRS call or come to a home or business. **Don't believe your caller ID.** Technology makes it easy for scammers to fake caller ID information, so the name and phone number you see aren't always real.

#### • **The IRS will never:**

- Call to demand immediate payment using a specific payment method such as prepaid debit card, gift card or wire transfer.
- Threaten to have you arrested for not making an immediate payment.
- Demand that you pay taxes without giving you the opportunity to question or appeal the amount they say you owe.
- Ask for credit or debit card numbers, or bank account information over the phone.

**If you spot a tax scam**, report it to the Federal Trade Commission, **1-877/382-4387** (or [ftc.gov/complaint](http://ftc.gov/complaint)) and the Treasury Inspector General for Tax Administration, **1-800/366-4484**.

***The IRS transfers certain overdue federal tax debts to a private collection agency for collection.*** Only three private collection agencies are authorized to represent the IRS: CBE Group of Waterloo, Iowa; ConServe of Fairport, N.Y.; and Coast Professional, Inc., of Albion, N.Y. No other private group is authorized to represent the IRS. The IRS will always notify you and your tax representative by letter before transferring your account to one of these private collection agencies and will provide the agency's name and contact information.

***New simplified tax return for seniors!*** Are you 65 or older? You may be eligible to use Form 1040SR. See <https://www.irs.gov/pub/irs-pdf/f1040s.pdf>, or consult with your tax advisor.

#### **FEDERAL INCOME TAX ASSISTANCE IS AVAILABLE FROM:**

1. **Low Income Taxpayer Clinics (LITC)** assist low-income individuals who have a tax dispute with the IRS. They also provide education and outreach to individuals who speak English as a second language. LITCs can represent you before the IRS or in court on audits, appeals, tax collection matters, and other tax disputes. Services are provided for free or for a small fee. LITCs are completely independent of the IRS. In general, to qualify for assistance from a LITC a taxpayer's income must be below a certain threshold, and the amount in dispute with the IRS must usually be less than \$50,000, but exceptions may be made in certain cases; contact the LITC to see if you qualify.

## Florida LITCs:

- Bay Area Legal Services, Inc. – **813/752-1335**
- Florida Rural Legal Services – **888/582-3410**
- Gulfcoast Legal Services – **727/821-0726**
- Legal Aid Service of Broward County – **954/737-2474** or **954/765-8950**
- Legal Aid Service of Collier County – **239/207-3402**
- Legal Aid Society of Palm Beach County – **561/655-8944**
- Legal Services of Greater Miami Community Tax Clinic – **305/576-0080**
- Legal Services of North Florida – **850/385-9007**
- St. Thomas University School of Law – **305/474-2453**

2. **AARP Foundation Tax-Aide** provides free, individualized tax preparation for low to moderate income taxpayers aged 50 and older. To find a location near you call **1-888/687-2277**, or go to <https://www.aarpfoundation.org/taxaide>.

3. The Internal Revenue Service has 2 programs offering free tax help:

· **The Volunteer Income Tax Assistance (VITA)** program offers free tax help to people who make \$54,000 or less (although some sites may have a higher income limit), persons with disabilities, and limited English speaking taxpayers who need assistance in preparing their own tax returns. IRS-certified volunteers provide free basic income tax return preparation with electronic filing to qualified individuals. Free remote tax filing assistance from the comfort of your home is available (no income limit requirement) to help you prepare your own tax return. This is the right option for you if: • You are only filing for 2021 (not previous years) • You're comfortable using online tax services • Your tax situation is simple/straightforward • You need a quick option. Every VITA Program in Florida will be accessible from one website portal: <https://FLTaxesOnline.org>.

· **The Tax Counseling for the Elderly (TCE)** program offers free tax help for all individuals who are 60 years of age and older. Tax return preparation assistance provided to seniors from January 1 – April 15. Other tax-related assistance may be provided year-round.

To find a VITA or TCE location near you, go to <https://irs.treasury.gov/freetaxprep/> or call **1-800/906-9887**. For additional helpful information, see <https://www.irs.gov/newsroom/avoid-scams-know-the-facts-on-how-the-irs-contacts-taxpayers>; <https://www.irs.gov/privacy-disclosure/report-phishing>; and <https://www.irs.gov/newsroom/suspicious-e-mails-and-identity-theft>.

**IF YOU'RE EVER IN DOUBT ABOUT AN IRS MATTER, CALL THE IRS DIRECTLY at 1-800/829-1040. You may also call the Florida Senior Legal Helpline at 1/888-895/7873 for free legal advice and referrals.**



*The Florida Senior Legal Helpline is funded by the Florida Department of Elder Affairs and managed by Bay Area Legal Services, Inc.*



\*This flyer was prepared with information from the Federal Trade Commission and Internal Revenue Service websites

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