



Tax Season is Here - Are you Prepared?

Beware of IRS Imposter Scams!

- **Here's how they work:** You get a call or email from someone who says she's from the IRS. This is particularly unnerving when it's tax season! She says you owe back taxes and threatens to sue you, arrest you, deport you, or revoke your driver's license if you don't pay right away. She tells you to wire money or put money on a prepaid debit card and give her the card numbers. Or, the caller may say you have a pending refund and that she needs 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 over the phone.

If you spot a tax scam, report it to the Federal Trade Commission (**1.877.382.4357** or 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; Coast Professional, Inc. of Geneseo, N.Y.; and ConServe of Fairport, 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.

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.

New free tax filing service: DIRECT FILE. This IRS pilot program is available in English and Spanish to electronically file you 2023 federal tax return for free directly with the IRS. Read more about the Direct File pilot program (e.g., if you are eligible based on your reported income, credits, and deductions) at <https://www.irs.gov/about-irs/strategic-plan/direct-file>.

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.

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 – **954.236.2477**
- Legal Aid Service of Collier County – **239.775.4555**
- Legal Aid Society of Palm Beach County – **561.655.8944 or 800.403.9353**
- Legal Services of Greater Miami Community Tax Clinic – **305.576.0080 or 866.686.2760**
- Legal Services of North Florida - **850.385.9007**
- St. Thomas University School of Law – **305.474.2453**
- A New Start Financial and Social Services, Inc. – **855.496.6476**
- University of Florida, Frederic G. Levin College of Law – **352.273.0800**

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 **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 generally make \$79,000 or less, 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 2023 (not previous years) • You're comfortable using online tax services • Your tax situation is simple/straightforward • You need a quick option.
- **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. However, program activities required to make sure senior taxpayers receive efficient and quality tax assistance may be conducted year-round.

To find a VITA or TCE location near you, go to <https://irs.treasury.gov/freetaxprep> or call **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 800.829.1040.



You may also call the Florida Senior Legal Helpline at 1-888/895-7873 for free legal advice and referrals.

