Sample article for organizations to use to reach customers (594 word count)

Customize and provide the following article in your communication vehicles with tax advice to single parents or first-time filers.

Tax help for single parents or first-time filers

It's hard enough facing all the challenges that come with becoming a single parent. Filing your taxes doesn't have to be one of them. If you're filing taxes for the first time or filing under a different status, there are a few simple steps to help you get started.

Step 1: Gather up last year's tax records, including your tax return. They can be a wonderful guide for finding what information is the same and what has changed. Can't find last year's tax return? Don't sweat it — there are three ways you can get a copy of your tax return transcript and tax account transcript.

- Go to www.irs.gov, select the *Individuals* tab and click on the topic Need a Copy of Your Tax Return Information? Next, click on the Order A Transcript link and follow the three easy steps. You'll need your Social Security Number or IRS Individual Taxpayer Identification Number, date of birth, street address and ZIP code. Online requests are accessible around the clock.
- Call 1-800-908-9946 and follow the voice prompts. You'll need the same information as above. This toll-free automated number is available around the clock.
- Mail Form 4506T, Request for Transcript of Tax Return, to the IRS. The form is available on www.irs.gov. Select Form 4506T from the section marked *Forms and Pubs.* Instructions, mailing addresses and fax numbers are located on page two of the form.

Step 2: Organize important documents that you'll need for this year's taxes. These documents should include:

- proof of identification;
- Social Security cards for you, your spouse and dependents or a Social Security number verification letter issued by the Social Security Administration or an Individual Taxpayer Identification Number issued by the IRS;
- birth dates for you, your spouse and dependents on the tax return;
- current year's tax forms, available FREE online or at your IRS office;
- income statements such as, Forms W-2, W-2G, 1099-R and 1099-MISC from all employers;
- interest and dividend statements from banks, credit unions or a brokerage company (Form 1099);
- a copy of last year's federal and state returns, if available;
- routing and account numbers for direct deposit;
- the total amount paid for a daycare provider and the daycare provider's tax identifying number (the provider's Social Security number or business Employer Identification Number); and
- divorce, trust or estate documents, if applicable.

Step 3: Either choose a local preparer to help you file or go online and file yourself. Most online filing software is easy to use and asks you all the right questions, including questions about life changes. All you have to do is supply the answers.

Step 4: If you have any questions or need assistance with your personal tax questions, go to IRS.gov, key word 1040 Central.

Also, the IRS Volunteer Income Tax Assistance and the Tax Counseling for the Elderly programs offer free tax help for people who qualify. Most locations also offer free electronic filing. Trained and certified volunteer tax preparers help people who make $50,000 or less. To locate the nearest VITA site, check on IRS.gov, and type VITA into the search engine. This site will be available in February. If you do not see a site close to your immediate area, call the VITA site locator number at 1-800-906-9887.

As part of the IRS-sponsored TCE Program, AARP offers the Tax-Aide counseling program at more than 6,000 sites nationwide during the tax filing season. *For* more information on TCE and to locate the nearest AARP Tax-Aide site, call 1-888-227-7669 or visit AARP's website.