



A Plan For Senior Care's Resource Guide For Tax Preparation



Tax time for seniors can be confusing and overwhelming. Use our guide to resources to assist your loved through this tax season.

- Don't assume that filing is not necessary. Although social security is generally not taxable, if your loved one has other types of income sources, a tax return may still need to be filed.
- For assistance in determining if your loved one needs to file a tax return, the IRS offers information on their website called "Do I need to File A Tax Return?" This resource will ask questions that will help clarify if the filing is necessary or if your loved one is entitled to a refund. <http://www.irs.gov/uac/Do-I-Need-to-File-a-Tax-Return%3F>
- If your loved one needs assistance to file, the IRS offers (VITA) Volunteer Income Tax Assistance. Certified volunteers provide basic income tax preparation with e-filing to qualified seniors. VITA locations can be found in libraries, shopping malls, schools and other convenient places within the community. You can also contact your local area Office on Aging, and they will provide you with the locations of free tax preparation sites.
- The TCE Program (Tax Counseling for the Elderly) extends assistance to persons age 60 and older. TCE is known for their expertise in questions regarding pensions and retirement questions unique to seniors. For more information on the TCE Program, contact the IRS at 1-800-829-1040. <http://www.irs.gov/Individuals/Tax-Counseling-for-the-Elderly>
- A free copy of the "Tax Guide for Seniors" (publication 554) is available from the IRS by calling (800) 829-3676.
- According to the Health Insurance Portability and Accountability ACT (HIPPA), long-term care and unreimbursed medical expenses may be tax deductible on Schedule A of your loved one's tax return. Review with your tax specialist, Internal Revenue Code under section 213. Revenue rulings are 76-106 and 76-841. To learn more, go to the IRS website www.irs.gov/publications Publication 554 (2012), Tax Guide for Seniors.

If your loved one is struggling at home to care for her/himself and you would like to explore senior care and housing options, please give us a call today. We will be happy to create a personalized care plan for your loved one.