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Department of Consumer Affairs

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**DEPARTMENT OF CONSUMER AFFAIRS COMMISSIONER MINTZ AND CENTER FOR ECONOMIC OPPORTUNITY EXECUTIVE DIRECTOR MORSE REMIND NEW YORKERS TO FILE TAXES FOR FREE OR LOW COST AND CLAIM THEIR TAX CREDITS AS APRIL 15th DEADLINE APPROACHES**

***New Yorkers Who Made \$57,000 or Less Can File for Free or Low Cost with the City's Tax Preparation Services Instead of Paying High Fees***

***H&R Block Partners to Waive Fee for Casualty Loss for New Yorkers in Sandy-Affected Zip Codes***

With one month left until the April 15th tax deadline, Department of Consumer Affairs (DCA) Commissioner Jonathan Mintz and Center for Economic Opportunity (CEO) Executive Director Kristin Morse encourage New Yorkers who made \$57,000 or less to file their taxes using the City's free or low cost filing options and claim important tax credits like the Earned Income Tax Credit (EITC) and the NYC Child Care Tax Credit. The City has also partnered with H&R Block to allow New Yorkers who live in Hurricane Sandy-affected [zip codes](#) and suffered the loss of their homes, household items, or vehicles to file the casualty loss form ([Form 4684](#)), which may reduce taxable income, for free at any H&R Block location in the City. City partners also opened Volunteer Income Tax Assistance (VITA) sites in Far Rockaway and Red Hook.

"The nearly \$8,000 EITC maximum refund for qualified New Yorkers and the \$1,733 Child Care Tax Credit add up to too much money to leave on the table. Go get your refund, New Yorkers, and we've got three easy ways to do it," said DCA Commissioner Mintz. "Call 311 or visit [nyc.gov/taxprep](http://nyc.gov/taxprep) to connect to a free or low cost site, get a \$49 H&R Block coupon or file for free online."

"The Earned Income Tax Credit has been the most successful antipoverty program in the nation, lifting more than six million people out of poverty as recently as 2010 and largely contributing to greater employment for single mothers," said CEO Executive Director Morse. "For many low-income families, a tax return is the largest check of the year. With April 15th fast approaching we encourage New Yorkers to visit a VITA center to meet this important deadline, and take advantage of the tax credits they earned."

**Volunteer Income Tax Assistance (VITA) Sites: Have Your Tax Return Done for Free.** New Yorkers with children who earn less than \$50,000 or those without children who earn less than \$18,000 can visit one of 90 VITA sites in the five boroughs where a certified volunteer will help prepare their taxes for free. New Yorkers who participated in the SaveUSA program last year are encouraged to visit a participating VITA site and fund their account again. Enrollment for new participants is closed for 2012 because there are no longer funds available. SaveUSA participants receive a 50 percent match, up to \$500, if they deposit at least \$200 of their tax refund into a SaveUSA account and maintain the initial deposit for one year.

**Online Tax Preparation Options: Do It Yourself for Free.** New Yorkers earning less than \$57,000 with or without children can file their taxes online for *free* at [nyc.gov/taxprep](http://nyc.gov/taxprep). The City is partnering with Intuit Inc.'s Turbo Tax Freedom Edition and myfreetaxes.com, powered by H&R Block, to offer these services. The casualty loss form can be prepared as part of these returns.

**H&R Block Discount: Have a Commercial Preparer Complete Your Tax Return for Only \$49.** New Yorkers who earn \$41,000 or less and have children, or individuals without children who earn \$18,000 or less, can also have their tax returns prepared at one of 51 participating H&R Block locations using the City-sponsored coupon, which can be downloaded from [nyc.gov/taxprep](http://nyc.gov/taxprep). The casualty form can be also included in this preparation option. New Yorkers who used the coupon in 2012 can return to a participating H&R Block and file their return using the same 2012 discounted rate.

As the April 15 filing deadline approaches, DCA inspectors continue to inspect tax preparers. To date the Department conducted more than 800 inspections Citywide and issued close to 200 violations to tax preparers who misrepresented their qualifications, violated consumer rights, or illegally advertised refund anticipation loans (RALs). In New York City, tax preparers must post their qualifications, fees and charges, and whether or not they will represent consumers at a government audit. Preparers must sign every tax return, and provide their customers with copies of their tax returns and receipts for their services.

Since 2002, the City's Annual Tax Credit Campaign has increased awareness about tax credits that put money back in the pockets of working New Yorkers, and helped qualifying New Yorkers file their taxes online for free or at low cost by contacting 311 or visiting [nyc.gov/taxprep](http://nyc.gov/taxprep). Last year's Tax Credit Campaign assisted 100,000 New Yorkers in filing their taxes through free or low cost options to claim more than \$162 million in credits and refunds. Over the past decade, the Campaign has helped New Yorkers claim over \$20 billion in federal, State and City refunds, including \$1 billion directly through the City's free and low-cost sites.

DCA enforces the Consumer Protection Law and other related business laws throughout New York City. Empowering consumers and businesses to ensure a fair and vibrant marketplace, DCA licenses more than 78,000 businesses in 55 different industries. Through targeted outreach, partnerships with community and trade organizations, and informational materials, DCA educates consumers and businesses alike about their rights and responsibilities. The DCA Office of Financial Empowerment (OFE) was launched by Mayor Michael R. Bloomberg at the end of 2006 as the first local government initiative in the country with the specific mission to educate, empower, and protect individuals and families with low incomes. OFE creates innovative programs, products, and services for New Yorkers so they can build assets and make the most of their financial resources. Our goal is to increase access to high-quality, low-cost financial education and counseling; connect individuals to safe and affordable mainstream banking and products and services; improve access to income-boosting tax credits, savings, and other asset building opportunities; and enforce and improve consumer financial protections to safeguard financial stability. For more information, call 311 or visit DCA online at [nyc.gov/consumers](http://nyc.gov/consumers).

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## 2013 Tax Preparation Required Documents

*If you are claiming losses as a result of Hurricane Sandy, your tax preparer will need the following:*

- Complete list of personal and non-real estate items lost in the disaster
- Full inventory of items lost or damaged and the value of the items; see [IRS Publication 584, Casualty, Disaster, and Theft Loss Workbook \(Personal-Use Property\)](#)
- Insurance reimbursement documentation, if available
- All types of FEMA reimbursement documentation, if applicable
- Any contractor estimates and repairs or replacement costs to damaged property
- Copies of your Federal tax returns for the last three years, if available

*When having someone prepare your taxes in person, bring:*

- Proof of identity, such as a driver's license or other photo ID

- Social Security cards for yourself, your spouse, and your dependents and/or a Social Security Number (SSN) verification letter from the Social Security Administration OR Individual Taxpayer Identification Number (ITIN) letter for all names on the return (original or copies)
- Birth dates for yourself, your spouse, and the dependents on the return
- Wage and earning statement from your employer(s): Form W-2, W-2G, 1099-R
- Interest and dividend statements from banks (Forms 1098 and 1099)
- A copy of your 2011 federal and state returns, if available
- Proof of any other income, e.g., lottery winnings
- Total paid for child care provider and the provider's Taxpayer Identification Number or SSN (if you are claiming the New York City Child Care Tax Credit)
- Bank account and routing numbers (if you are directly depositing your refund). Note: If you use direct deposit, you should receive your federal tax refund within 21 business days.
- To file a Married Filing Jointly return, both spouses must be present to sign required forms.

*When preparing taxes online, you'll need:*

- Social Security Number (SSN) OR Individual Taxpayer Identification Number (ITIN) for yourself, your spouse, and the dependents on the return
- Birth dates for yourself, your spouse, and the dependents on the return
- Your 2011 Adjusted Gross Income (AGI) or Self-Select PIN number. (AGI is the amount shown on your 2011 Form 1040, line 38; Form 1040A, line 22; or Form 1040EZ, line 4. The Self-Select PIN is the five-digit PIN you used to electronically sign your 2011 return.) If you cannot find this information, call the Internal Revenue Service (IRS) at 1-800-829-1040.
- Wage and earning statement from your employer(s): Form W-2, W-2G, 1099-R
- Interest and dividend statements from banks (Forms 1098 and 1099)
- Proof of any other income, e.g., lottery winnings
- Total paid for child care provider and the provider's Taxpayer Identification Number or SSN (if you are claiming the New York City Child Care Tax Credit)
- Bank account and routing numbers (if you are directly depositing your refund). Note: If you use direct deposit, you should receive your federal tax refund within 21 business days.