

Indiana Legal Services, Inc



Using the law to fight poverty, empower clients, and improve access to justice.

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Finding Tax Help for Survivors

VITA programs: Tax preparation assistance



IRS's Volunteer Income Tax Assistance (VITA) program uses IRS-certified volunteers to provide free tax return preparation assistance to people who generally make no more than \$54,000/year, persons with disabilities, and limited English-speaking taxpayers.

The Tax Counseling for the Elderly (TCE) program also uses IRS-certified volunteers to provide free tax preparation help to all taxpayers, particularly those who are age 60 and over.

Generally, VITA and TCE services are only available during the traditional tax-filing season – from the end of January until April 15. There is a [VITA/TCE locator tool](#) on the IRS website.

Free tax return preparation assistance is difficult, if not impossible, to find, once tax-filing season has ended. However, IRS provides on its website a program called [Free File](#) to enable low to moderate income taxpayers to file their tax returns electronically for free using taxpayer-friendly commercial software.

Similarly, United Way offers taxpayers with annual income under \$62,000 the ability to use a program called [My Free Taxes](#) to file their tax returns electronically for free using easy to follow commercial tax software. AARP offers similar online assistance.

Low Income Taxpayer Clinics



LITCs are organizations that receive a matching grant from IRS to provide representation, education and outreach to low income taxpayers and taxpayers with limited English proficiency.

LITCs represent individuals in disputes with IRS. They handle a wide range of matters, including but not limited to IRS audits, collection matters, appeals to Tax Court, tax-related identity theft problems, and requests for innocent spouse relief. LITC services are free or of nominal cost to eligible individuals.

Taxpayers can find contact information for LITCs in their state by visiting the IRS website. Many LITCs are located in legal services offices where survivors may receive other types of legal help in addition to tax help. LITCs use staff attorneys and/or CPAs and pro bono professionals to provide representation to their low income clients.

Taxpayer Advocate Service (TAS)

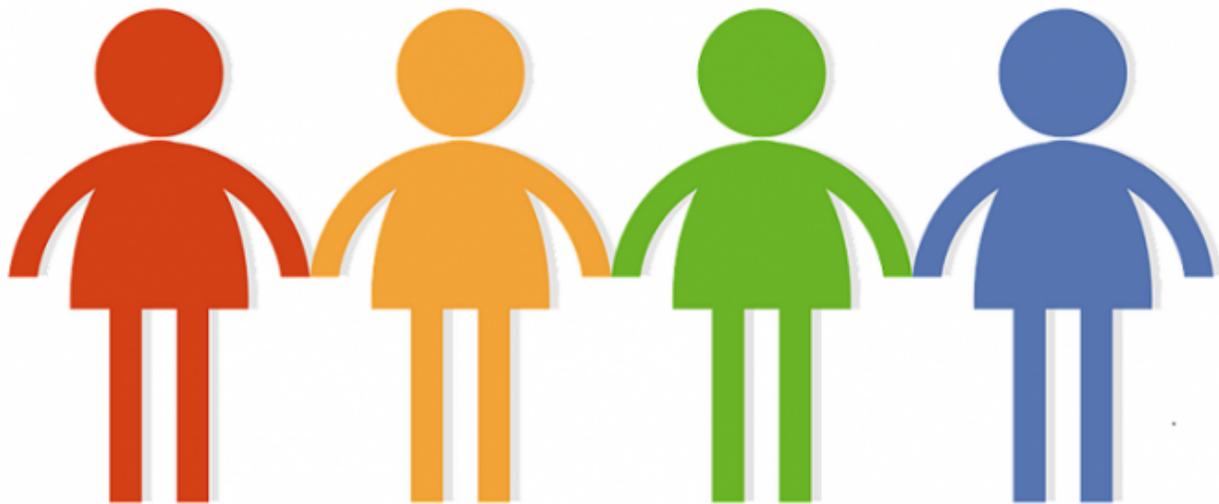
TAS is an independent organization within IRS that will provide free help to taxpayers to resolve problems with IRS.

To qualify for help, a taxpayer must be experiencing economic harm or significant cost (including fees to hire a representative), have experienced a delay of more than 30 days to resolve their tax

problem, or have not received a response or resolution of their problem by the date promised by IRS.

There is at least one TAS office in each state. A taxpayer needing help can locate the nearest TAS office using the IRS website. TAS routinely helps taxpayers with a wide range of problems including those involving identity theft and collection activity causing economic hardship.

Building partnerships with tax professionals



Many tax professionals – lawyers, CPAs and enrolled agents – have never been asked to do pro bono work. They may rarely encounter low income clients or have no idea of the extent of the tax problems faced by low income taxpayers, including survivors. Consequently, they are unaware of the how badly their pro bono services are needed.

Many organizations that serve survivors already have a pro bono panel composed of family law attorneys to whom they can refer survivors. Adding tax professionals to this panel is a great way to meet the tax needs of survivors.

Our LITC is always seeking partners in our community who work closely with survivors. If you are interested in forming a partnership with us, contact us!

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<http://www.indianalegalservices.org/Survivors-tax-help>

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