



Tax Assistance

Evergreen Commons is once again offering tax assistance for low to moderate income seniors and low income non-seniors. This service is provided on a first-come, first-served basis, and you do not need an appointment. When you arrive, please register with the receptionist at the desk on the 2nd floor. Beginning on February 2, we will be preparing Federal and Michigan Income Tax forms as well as the Homestead Property Tax Credit and the Heating Credit forms. These services will be offered on Thursdays, February 2 – April 12, 9:00 a.m. – 2:00 p.m., on the 2nd floor.

If you are homebound, you may leave your name, phone number and address on a voice mail at 355-5117. A tax volunteer will contact you in March to set up an appointment to assist you with tax forms in your home.

Information needed to have your 2011 tax forms prepared (please read carefully):

1. Copies of 2010 tax returns.
2. Income information: W2's; 1099's; Social Security; SSI; Railroad Retirement Wages; Interest and dividends from banks, stocks, bonds, mutual funds, etc.; Pensions; Annuities; IRA's; inheritance; lottery winnings; and other income of any type including any tax free information (Fed & State).
3. Homeowners (including condos) 2011 property tax bills (summer/winter).
4. Renters (including mobile homes) Monthly rents for 2011, Landlord's name and address.
5. Amount paid for supplemental health insurance in 2011 (AARP, Blue Cross, etc.).
6. The portion of auto insurance paid for medical coverage in 2011. You can get this information from your insurance company.
7. Heating credit: Heat cost from Nov. 1, 2010 to October 31, 2011. You can get this information from your gas company or other heat provider.
8. Sale of home: Date purchased, purchase price, cost of improvements, closing statement showing sale price, selling costs, etc. Copies of total property taxes levied on former home and present home for year 2011.
9. Sale of stock or mutual fund (If you receive periodic payments from a mutual fund these may be reported as sales by the fund.) Date of stock purchase; purchase price of stock; amount of reinvestments in a mutual fund.
10. Estimated payments made for 2011.
11. Receipts/info on energy credit home improvements.
12. Checkbook and 2011 check register—for reference only.
13. **Two forms of identification.** One must be photo identification and the second must be the Social Security Card, the ITIN Card or Letter. One or both must show the current mailing address.

Homestead Property Tax Credit Information

The Homestead Property Tax Credit is a state benefit to eligible Michigan residents who pay high property taxes in relation to their income. The credit you receive depends on your income with the maximum credit being \$1,200. The Homestead Property Tax Credit can be used to reduce the amount of taxes owed or it can be issued as a refund. You may qualify for the Homestead Property Tax Credit if you own your home or if you rent. Many seniors assume they do not qualify for this credit if they rent and therefore miss out on money for which they may be eligible.