



Henderson County Public School Employees may drop off their tax information to the State Employees' Credit Union. The SECU will complete the tax returns and have them ready to file within three business days or less. Employees can make their process shorter by visiting their website [www.ncsecu.org](http://www.ncsecu.org) under Tax Preparation Services and complete the Intake/Interview Questionnaire prior to their visit. Please see the flyer on the next page.

*You may be eligible for the **free VITA service** if your household income was **\$51,000 or less for the 2012 tax year**. Tax preparation services will be available at your local State Employees' Credit Union branch beginning **January 24<sup>th</sup>**.*

**SECU tax preparers can assist with all versions of Form 1040 which includes reporting items such as itemized deductions, IRA deductions, retirement income, self-employment income (on Schedule C-EZ), Health Savings Account (HSA) transactions, and more!**

**We will also help you claim eligible credits including:**

- Earned Income Tax Credit
- Retirement Saver's Contribution Credit
- Child Tax Credit
- Additional Child Tax Credit
- Credit for the Elderly and Disabled

**Call or visit your local branch today to see if SECU can help with your tax preparation needs. Our tax preparers will ask you a few questions and determine within minutes if you are eligible. A few minutes of your time could lead to savings in your pocket!**

SECU members who do not qualify for free tax preparation through VITA may be eligible for SECU's Low Cost Tax Preparation program. See a credit union representative for more information. If interested in a self-service option, SECU members may also utilize TurboTax® at a discounted price through the SECU website, [www.ncsecu.org](http://www.ncsecu.org).

Please note, SECU tax preparers cannot complete forms containing: Income from states other than North Carolina; Self-employment income that requires a Schedule C; Rental income; Farm income; Military income\*\*; Adoption credits; Foreign income; Complicated or advanced Schedule D (Capital Gains and Losses). You must be a full-year resident of North Carolina to qualify for tax preparation.

\*\*SECU cannot complete returns with current military income (Form W2) but can complete military pension income (Form 1099R).

**Please bring the following items in order for SECU to complete your return:**

- Picture ID for taxpayer and spouse, if applicable
- Social Security cards for yourself and all individuals on your return (spouse and dependents)
- Your 2011 tax return
- All income documents including W-2s, 1099s and other documents
- Documentation of higher education expenses including tuition paid and student loan interest paid
- Daycare expenses and daycare provider's name, address and tax ID number
- Documentation to support itemized deductions if applicable – includes mortgage loan interest paid, charitable contributions, property taxes paid (home & auto) and medical expenses.