

Bullet Background Paper

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JBSA Fort Sam Houston Military Tax Assistance Center (MTAC) “Drop Off Service”

PURPOSE

Provide a streamlined method for students to file simple tax returns with Fort Sam Houston MTAC.

CONCEPT

- Drop off service allows students to visit the MTAC over lunch and spend a maximum of ten minutes with the site coordinator, and get their taxes filed without waiting in hour long appointments.
- Drop off service will only work with simple returns that can be filed on 1040 EZ.

INSTRUCTIONS

- Students should fill out PDF, 1040 EZ qualifying questionnaire.
- If the questionnaire indicates that students qualify, students should save the PDF under their first and last name and send the PDF to jbsataxcenter@gmail.com. Students should ensure to include a phone number and preferred email address in the appropriate place on the questionnaire.
- The director of MTAC or assistant site coordinator will then call or email to verify qualification and transmit required documents lists. The initial contact will also set up a day when the individual student can visit the MTAC during lunch or immediately after final formation to drop off taxes.
- When taxes are done, the student will be contacted to come in and do final check before filing.
- Initial and final visits should be no more than 10 minutes each.
- Fort Sam MTAC is located in the same building as the USO, 1395 Chaffee Road.