



Virtual Taxpayer Services Frequently Asked Questions

Q: What is Filing for Freedom?

A: Filing for Freedom brings the tax and legal communities together to provide free tax preparation services for military personnel and first responders at certain sites around the United States. We appreciate the support of many professional affiliations, including numerous state CPA societies, state and local bar associations, the Pro Bono sections of the American Bar and Federal Bar, and government agencies including the Department of Defense and the Internal Revenue Service.

Q: What type of military personnel and first responders can sign up?

A: While Filing for Freedom's aim is to one day assist all current and former military personnel and first responders, we are not there yet. As such, the current focus is to serve Active Duty enlisted military personnel at specific military bases where Filing for Freedom has been approved. Filing for Freedom also currently serves police officers with the Atlanta Police Department (including trainees) and firemen with the Atlanta Fire Department.

Q: Can I still sign up if I am Active-Duty military but in an officer rank?

A: Complex tax returns are outside the scope of what volunteers prepare. It is likely that someone at the officer level will have a more complex tax return (i.e., rental income, investments with a Schedule K-1, etc.). If such complexities are not applicable and you meet the other requirements, then you are welcome to sign up.



If we are unable to prepare your tax return because your needs are outside of our scope, we will try our best to let you know as soon as possible.

Q: I have not previously participated with Filing for Freedom, where do I sign up?

A: Please visit [Sign Up Link](#) to register for free virtual tax preparation services.

Q: Which bases / organizations are participating with Filing for Freedom?

A: The following bases /organizations are participating for 2024:

Region	Location	Dates
Georgia	Dobbins ARB	Feb 3-4, Mar 2-3, Apr 6-7
	At-Youth Promise Center for Atlanta Police / Atlanta Fire	Feb 10-11, Mar 16-17
DC / Maryland / Virginia	Andrews AFB	Feb 14 – Apr 6 (Wed-Sat)
	Fort Myer	Feb 14– Apr 6 (Wed- Sat)
Texas	Randolph AFB	Feb 14 – Apr 6 (Wed- Sat)
Kentucky	Fort Knox	Feb 14 – Apr 6 (Wed- Sat)
Louisiana	Fort Polk	Feb 14 – Apr 6 (Wed- Sat)
Oklahoma	Fort Sill	Feb 14 – Apr 6 (Wed- Sat)

Q: Will I get the contact information for my preparer or other volunteers if I have questions later?

A: No. Volunteers are not able to provide their contact information. Should you have a question, please reach out to the team at Filing for Freedom.

Q: Will someone try and sell me something during the process (i.e., insurance)?

A: No. Volunteers are strictly prohibited from soliciting any business. If a volunteer attempts to do so, please report this to the team at Filing for Freedom.



Q: What is the time commitment for virtual tax preparation?

A: You should plan on spending up to 2-3 hours in total across all sessions, depending on the complexity of your tax return. Tax preparation is done in multiple stages by multiple volunteers who will work within a window of time to complete your tax return:

Stage 0: Once registered, if you have not provided certain information in your registration, you will be contacted by a member of Filing for Freedom on the phone to get such information (SSN, filing status, date of birth, etc.) to set up your online Customer Portal. You will then be able to access your Customer Portal and upload requested documents (see below). Once uploaded, your return will be assigned to volunteers. One or more of these volunteers on the team may request additional information via email, phone, or Zoom.

Stage 1: A Greeter reviews your Intake Form and documents for completeness.

Stage 2: A Preparer prepares your tax return and may ask numerous questions.

Stage 3: A Reviewer reviews your draft tax return and may also ask questions.

Stage 4: Your completed tax return will be uploaded to your Customer Portal for your review and electronic signature. Once signed, your tax return will be submitted to the tax authorities. We will alert you if there are any issues with your filing. You should download a copy of your signed tax return for your records.

Q: What equipment do I need to participate virtually?

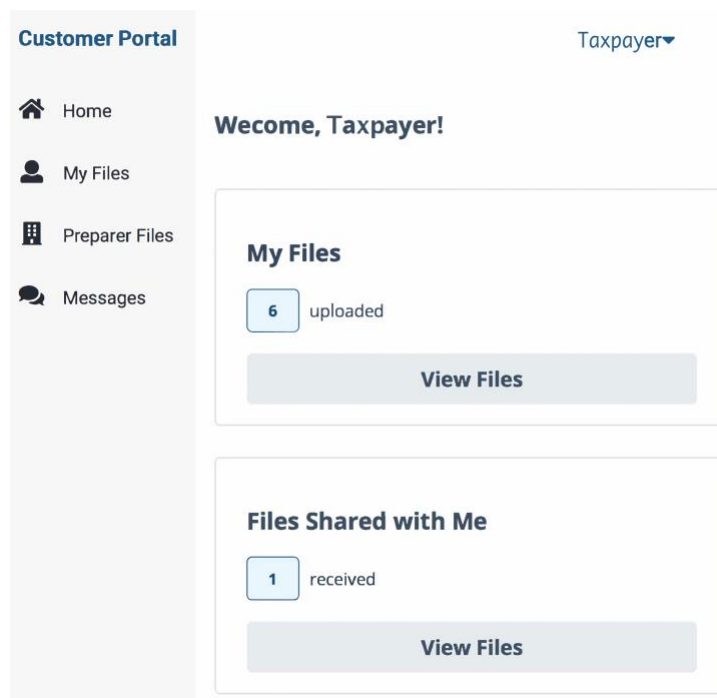
A: You will need to have a computer / laptop that has both a webcam and microphone, as well as the ability to scan and upload documents.

Q: How will I be given access to the Customer Portal?

A: The Customer Portal enables volunteers and taxpayers to securely share documents, including tax return signature documents. You will receive an email



message from TaxStatusNow.com with a link to your Customer Portal. For security, an MFA code will be sent to your mobile phone number. You will then need to create a username and password to finish setting up your Customer Portal account. Once complete, you may begin securely uploading documents.



Q: What documents do I need to upload to my Customer Portal?

A: Review of your information and preparation of your tax return cannot begin until you upload the following documents to your Customer Portal:

1) Filing for Freedom IRS Forms:

a) Intake Form: *Please complete, print, sign and upload [IRS Form 13614-C](#)*

b) Consent Form: *Please complete, print, sign and upload [IRS Form 14446](#) to give consent for virtual tax return preparation.*

2) Your driver's license (and a copy of your spouse's driver's license, if applicable)



- 3) Your social security card (and copies for your spouse and children, if applicable)
- 4) All Forms W-2 and 1099 that you (and your spouse, if applicable) received
- 5) Any other tax documents you received, such as the following:
 - bank interest income received (Form 1098),
 - mortgage interest paid (Form 1095),
 - support for any gifts to charities, etc.
- 6) Bank account information for any electronic refunds or direct debit payments
- 7) Prior year tax return as filed (*optional*)

Q: How do I sign my tax return in the Customer Portal?

A: Once your tax return has gone through the stages noted above, you will be asked to log into your Customer Portal again to review and electronically sign your tax return. Please click on either “Files Shared With Me” or “Preparer Files” and the file sent by the Preparer/Reviewer will be available. Once ready, please click on the button “Click to Add Signature” and you will be able to draw your signature and save it. If a joint return, your spouse will also need to sign in their designated space. See screenshots below. After signing, please remember to save your signatures to the document in order for them to be added to your tax return and subsequently placed in queue for submission and filing with the tax authorities. Please be sure to download and save a copy of your tax return for your records.



Files From My Preparer

Taxpayer:

[Click To Add Signature](#)

File Name

Date Sent

View

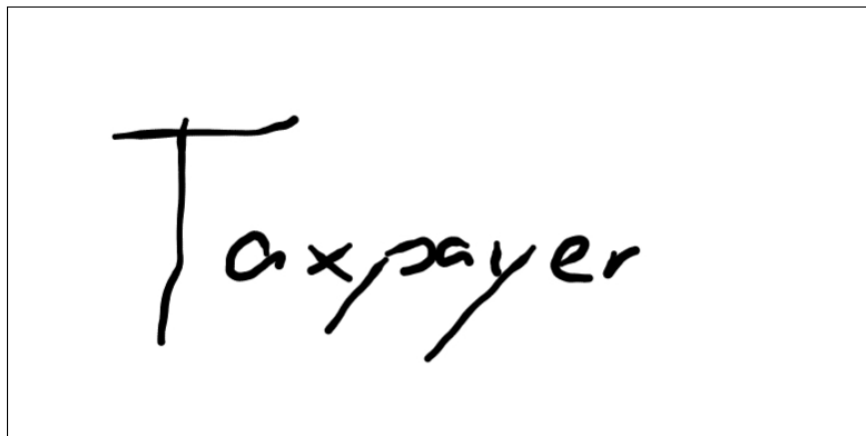
12345678-123-aaa-bcccc1234_123456789_Proweb.pdf

04/01/2023 12:00:00 PM

[View](#)

[Back](#)

Edit Taxpayer Signature



[Back](#)

[Clear](#)

[Save](#)



Q: What if my tax return submission is rejected by the IRS?

A: After submission, if there are any issues with your filed tax return, someone from Filing for Freedom will contact you. This may occur where multiple taxpayers claim the same dependent, or a name on the return does not match the name in the IRS database, or the identity PIN issued by the IRS was not included, or any host of other reasons. Filing for Freedom will work with you to get the situation resolved and your tax return successfully resubmitted.

Q: What if I have not filed a tax return for prior years?

A: Certain volunteers with Filing for Freedom are qualified to prepare your tax returns for specific prior years. If you have all your information and would like to do so, please reach out to us to coordinate.

Q: Can you help me file an amended tax return for a prior year?

A: No. We are not able to assist you with amending a prior year tax return.

Q: What if I decide to have my tax return prepared elsewhere after beginning the process?

A: Please contact us at support@FilingforFreedom.org as soon as possible.