



SENIOR NUGGET – MARCH 2024

IT'S TAX TIME

If you put these two words together — The IRS, it spells THEIRS!

DO YOU NEED TO FILE A TAX RETURN?

Answer: It depends on how much you earned (gross)

- **Contact your tax preparer to determine your status**

FOR TAX PREPARATION ASSISTANCE, check with a local SENIOR CENTER OR

- **AARP Tax-Aide: 1-888-227-7669**

To obtain free detailed Tax Guide breakdown for seniors:

Telephone: 1-800-829-3676 or online: www.irs.gov/pub/irs-pdf/p554.pdf



HAPPY ST. PATRICK'S DAY



IT'S TAX TIME ... “The IRS” put together spells “THEIRS”

- ❖ **Keep all receipts for medical co-pays, prescriptions, glasses, Dental, etc. for next tax season**
- ❖ **Maintain a mileage log to/from medical appointment(s)**
- ❖ **Take time to organize important papers (handy when needed)**

Key deductible items – verify with tax advisor (list changes yearly)

- ❖ **Keep receipts for contributions to church**
- ❖ **Retain receipts for contributions to qualified charities**
- ❖ **Bank and mortgage interest**
- ❖ **Medical co-pays, eye glasses, dental, etc.
(based on percentage of allowable items)**
- ❖ **Health coverage premiums (Medicare, secondary, long-term, etc)**
- ❖ **Mileage for medical visits and for certain jobs using personal car**
- ❖ **Dues (professional or job required)**
- ❖ **Home office expenditures for those self-employed individuals**

Best wishes to all celebrating a March Birthday

Check your Bible Birth verse: www.birthverse.com

~~ Current and past Senior Nuggets may also be viewed on Atholton's website ~~~