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**Subject:** Tax Brief #1 - January 2015

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*January  
2015*

## Tax Filing Season

The Internal Revenue Service will begin processing paper and electronic returns on January 20, 2015.

The Benefit Bank tax filing services will be available on **January 20 at 9am EST**. The filing deadline for this tax year is April 15, 2015.

## Income Limits for The Benefit Bank

Individuals who file with a "Married Filing Jointly" filing status can have an adjusted gross income (AGI) of up to **\$95,000**.

All other tax filers must have an AGI of less than or equal to **\$65,000**.

## January Tax Filers

Be sure you have received ALL of your tax forms and documents before filing your tax return. Employers and issuers of tax forms can mail out these forms and statements (such as W-2, 1099-R, 1099-MISC, etc) to the taxpayer as late as **January 31st**.

If you file your taxes prematurely, without having all the necessary forms, you risk having to file an Amended Return 1040X later which The Benefit Bank doesn't support costing you potential time and money. Therefore, double-check to make sure you have everything you need before you begin.

## Same-Sex Married Couples

As was the case last year, same-sex married couples will be able to use The Benefit Bank to file a return as a married couple, using either the Married Filing Jointly or Married Filing Separately status.

New this year, same-sex married couples will also be able to file their state returns as a married couple using The Benefit Bank in Pennsylvania, North Carolina, and South Carolina.

## Help Desk Availability

Help Desk will expand their hours of operation starting on Tuesday, January 20th to the following days/times:

Extended Hours for Help Desk

- Mon Fri 9 a.m. to 8 p.m. (Eastern)
- Saturday 9 a.m. to 5 p.m. (Eastern)

*Extended Hours end April 15th*

## Marketing Tab

Log in to The Benefit Bank and click on the new Marketing Tab to access tax outreach fliers for Counselor-Assisted and Self-Serve in English and Spanish.

Outreach materials for Ohio can be accessed through the Ohio Benefit Bank website.

Developed by Solutions for Progress, Inc.

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