

TAX ASSISTANCE FOR SENIORS

“Primarily supports the Senior population, but is open to anyone”

Carteret County

Ann Street United Methodist Preschool

500 Ann St, Beaufort, NC 28516

Phone: 252-728-4279

Day(s): Saturdays 9:00 AM – 2:00 PM

Starting: 2/1/2025 Ending: 4/14/2025

Appointment Required

Western Carteret Public Library

230 Taylor Notion Rd, Cape Carteret, NC 28584

Phone: 252-725 2714

Day(s): Wednesdays 10:00 AM – 4:00 PM

Starting: 2/1/2025 Ending: 4/14/2025

Appointment Required

Leon Mann Senior Enrichment Center

3820 Galantis Dr, Morehead City, NC 28557

Phone: 252-622-4038

Day(s): Thursdays 9:00 AM – 2:00 PM and Fridays 9:00 AM – 2:00 PM

Starting: 2/1/2025 Ending: 4/14/2025

Appointment Required

Core Sound Waterfowl Museum

1785 Island Rd, Harker’s Island, NC 28531

Tuesday March 18th, 2025 10:00 AM – 4:00 PM

FORMS AVAILABLE AT:

Beaufort Library 252-648-7725
Newport Library 252-648-7727
Down East Library 252-648-7729

Craven County

St Christopher's Episcopal Church
1100 E Main St, Havelock, NC 28532
Phone: 510-673-9602

Day(s): Fridays: 9:00 AM – 1:00 PM
Starting: 2/1/2025 Ending: 4/15/2025

No appointment required

Harrison Center
311 Middle St, New Bern, NC 28560
Phone: 252-772-5245

Day(s): Mondays 9:00 AM – 3:00 PM and Tuesdays 9:00 AM – 3:00 PM
Starting: 2/1/2025 Ending: 4/15/2025

No appointment required

Duplin County

Duplin County Senior Services
156 Duplin Commons Dr, Kenansville, NC 28349
Phone: 910-296-2140 (Duplin County Senior Center)

Day(s): Monday 9:00 AM – 11:00 AM
Starting: 2/1/2025 Ending: 4/7/2025

Pick up packet Required

Greene County

Greene County Senior Center

104 Greenridge Rd, Snow Hill, NC 28580

Phone: 252-747-5436

Call for appointments

Starting: 2/1/2025 Ending: 4/14/2025

Appointments Required

Jones County

The Filling Station

221 Main St, Pollocksville, NC 28573

Phone: 252-224-1127 (www.newbernvita.com)

Day(s): 2/15/2025, 3/15/2025, and 4/5/2025 9:00 AM – 3:00 PM

Lenoir County

NO SITES AT THIS TIME

Onslow County

NO SITES AT THIS TIME

Pamlico County

Pamlico County Senior Citizens Center

800 Main St, Alliance, NC 28509

Phone: 252-745-3488

Day(s): Wednesdays 9:00 AM – 3:00 PM & Saturdays 9:00 AM – 1:00 PM

Starting: 2/5/2025 Ending: 4/12/2025

Appointment Required

Wayne County

Smithfield Location/Contact Hermanita Harris

Phone: 919-705-1784

Appointment Required

**It is important to be organized and prepared before your appointment.
Bring the following documents with you:**

- Last year's tax return
- Social Security cards or other official documentation for yourself and every individual on your return
- Photo ID for all taxpayers
- Proof of bank account routing and account numbers for direct deposit (blank check)
- W-2 Forms from **all** employers
- Unemployment compensation statements
- SSA-1099 Form showing the total Social Security benefits paid to you for the year, or Form RRB-1099, Tier 1 Railroad Retirement benefits
- 1099 Forms reporting interest (1099-INT), dividends (1099-DIV), proceeds from sales (1099-B), as well as documentation showing the original purchase price of your sold assets
- 1099-R Form if you received a pension, annuity, or IRA distribution
- 1099-MISC Forms
- Information about other forms of income
- State or local income tax refunds
- All forms and canceled checks showing federal and state income tax paid (including quarterly estimated tax payments)

Most taxpayers have a choice of taking either a standard deduction or itemizing their deductions. If you have a large amount of deductions, you may want to itemize. Bring the following information:

- 1098 Form showing any home mortgage interest
- A list of medical/dental expenses (including doctor and hospital bills and medical insurance premiums), a list of prescription medicines, costs of assisted living services, and bills for home improvements, such as ramps and railings for people with disabilities
- Summary of contributions to charity
- Receipts or canceled checks for all quarterly or other paid taxes
- Property Tax bills and proof of payment
- 1095A, 1095B, 1095C Forms (if applicable)
- Any exemption correspondence from the Marketplace (if applicable)
- Dependent care provider information (name, employer ID, or Social Security number)
- 1098-T and 1098-E Forms (Tuition and Student Loan Interest)