

TAX CLINIC FOR SENIORS—PERSONAL INCOME TAX E-FILING-2024



LB1 Mobile Tax Assistance & Education Services Program

This 8-weeks Tax Clinic is to assist Seniors (55+) with their personal income tax filing for 2024 for simple returns, i.e. 1040-SR & 1040, to report W-2, 1099-R, SSA-1099, 1099-INT, and 1099-DIV.

Dates: Wednesdays

Time: 9:15am—2:45pm

Appointment Duration Time: 45-60 minutes

Begins: February 5, 2025 to

Ends: March 26, 2025

Appointments Only—No Walk-ins

Last appointment of the day is 2:00pm.

Virtual appointments available for complex returns. Must email or call for an appointment.

Fee: Based on sliding scale, includes tax software processing charge and tax preparer services fee ranging from \$99.64 to \$199.64 depending on return complexity. All returns are e-filed. LB1 Mobile Tax is an authorized e-filer provider.

Contact us to schedule an appointment or if you have a questions at:

taxassistance@lb1mobiletax.org

925-322-1396

Leslie Bonner, EA, MLS, LB1 Mobile Tax, LLC

Leslie Bonner has 35 years of experience in tax law in various areas, including individuals. Leslie is a Tax Advisor and Enrolled agent with professional experience in helping clients resolve complex tax issues — especially as these issues relate to rental property and passive loss rules, employment taxes, trust, estate and gift taxes, real property & taxation.

Leslie holds a Masters in Legal Studies from Washington University at St. Louis School of Law, and a Bachelor of Science in Accounting from Woodbury University. Leslie is an Enrolled Agent who is admitted to practice before the Internal Revenue Service.

Leslie frequently speaks and holds events and webinars on multiple topics including Small Business Workshop, Foreign Persons & Their Tax Responsibilities, Foreign Banks and Financial Account and Tax Reporting Requirements, Real Property & It's Taxation, Estate Tax Planning & Taxation, Worker Classification & Tax Filing Requirements, and Personal Income Tax Law, as well as tax planning, tax preparation, tax audits & representation, and appeals representation before the Internal Revenue Service.

We place an emphasis on quality of service. We abide by a strict code of ethics and participate in continuous tax education to provide quality tax preparation and tax consulting.

We provide the best tax advice for tax advantages for our clients. Our continuous tax education ensures our tax compliance is of the highest professional standards as required by federal and state agencies and our commitment to maintaining quality of service.

