

LOCAL 639 LEGAL SERVICES TRUST FUND
PO Box 99489, Troy, MI 48099
Phone (202) 636-8181

January 2024

The Board of Trustees of the Local 639 Legal Services Plan is notifying all **eligible participants** of the annual Income Tax Preparation Benefit. The Fund will pay up to \$140 of the fee charged by a Professional Tax Preparer for the preparation of your 2023 income tax return. Further, the Fund will allow electronic filing fees as part of the \$140 maximum benefit.

To take advantage of this valuable benefit you must:

1. Be eligible for services on the date your return was prepared.
2. Have a **Professional Tax Preparer** prepare your return.
3. Provide us with a **Tax Preparer's Receipt** that clearly shows:
 - a. Your full name;
 - b. The Tax Preparer's social security number or federal tax identification number; and
 - c. The Tax Preparer's fee and services provided.
4. Provide us with a **copy** of the **completed signature section only** for your Federal form 1040 tax return which shows your signature and the signature and Federal Identification number of your Professional Tax Preparer.
5. Complete the **lower portion of this letter**.
6. Return this letter and **all the information requested** to the Fund Office at **PO Box 99489, Troy, MI 48099**.

Reimbursement will only be made to you. You can help avoid the delay in getting your allowable reimbursement by making sure you have provided us with all the information requested.

Sincerely,

Scott Clark, Chairman-Trustee

Michael Goble - Trustee

Leon Kenneth Hamilton, Trustee

Frank W. Stegman, Trustee

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PARTICIPANT'S

NAME: _____ **SOCIAL SECURITY NUMBER:** _____

ADDRESS: _____
