It's happened two or three times in recent years to Wayne and Jo Stewart, of the Village Alhambra. An unknown number pops up on their phone. A voice on the other end says they represent the IRS, and if the couple doesn't do what they say, they'll be headed to jail that night. Thanks to increased publicity about the common phone scam, Jo said they have learned what to do. "If someone calls and says they're from the IRS, hang up," she said. That is the exact advice local tax experts would give to someone on the answering end of a fraudulent IRS phone call. Hang up. It's one of many ways Villagers can avoid being scammed this tax season. Bryan Lifsey, manager of the Sumter County office of Seniors vs. Crime, said his office gets calls frequently from people worried about the fake calls from the IRS that threaten jail time if they don't pay. "We get those calls from people every single day that we're open," he said. "The IRS doesn't make those phone calls, and there is no arrest warrant. You won't be in jail tonight."
The IRS also reported an increase in similarly fraudulent attempts that are sent out by email and text message. The messages look like they are from the IRS or a tax professional, but contain malicious links that either phish for your personal information or install malware on your computer.

As a general rule, John Krier, district coordinator for AARP Foundation Tax-Aide, said the best way to avoid falling victim to tax fraud is to file your taxes as early as possible.

With a handful of high-profile data breaches happening in the last year, Lifsey said there is an increased chance that your personal information is at risk of getting picked up by a scammer.

The Federal Trade Commission reports that in the Equifax data breach alone, 143 million American consumers had their personal information leaked.

If that information, such as your Social Security number, gets in the wrong hands, Krier said scammers can use it to file a false tax return in your name.

“The scam artists typically file before the real filer has a chance to get in and get theirs prepared,” Krier said. “The solution to that is to file early before these guys have a chance to get in there.”

Paul and Mary Lynne Petz, of the Village of Hillsborough, were ahead of the curve.

They waited in line at Colony Cottage Recreation Center on Thursday, less than two weeks after filing season started, to get their taxes done by AARP Foundation Tax-Aide volunteers.

Tax-Aide has 173 volunteers at eight locations across The Villages and the surrounding communities to help locals file their taxes for free.

The Petzes had trouble getting an appointment with Tax-Aide last year, so they were sure to call early this year to reserve their spot.

With two months left until the tax deadline, Krier said 85 percent of appointments between then and now already are booked.

He said The Villages Tax-Aide district expects to file close to 10,000 tax returns this year.

If you can’t file early, or you want an extra layer of security, Krier recommends signing up for an Identity Protection PIN through the IRS.

When you sign up, you will be mailed a form with a six-digit code that has to be filed along with your taxes to verify the return’s authenticity.

“It verifies to the IRS that you are who you say you are,” Krier said.

The IP PIN pilot program, which has been active since 2011, is only widely available to residents of Florida, Georgia and the District of Columbia who filed their federal tax returns in one of those three areas last year.

The IRS reports that it is testing the program in those areas because they have the highest per-capita percentage of tax-related identity theft.

Jo and Wayne said each big tax scam trend that comes along tends to become frequent chatter among their friends here in The Villages.

Krier sees that as a positive. As more people become aware of these scams, he said, less people are likely to fall for them.
THE VILLAGES DAILY SUN
Monday, Feb 12, 2018 – Pages A-1 and A-25
Stay Alert: Don’t Fall For A Tax Scam This Season

1
HOW THEY WORK
Either by phone or email, con artists force seniors to make fast decisions, sometimes in a threatening manner; disguise their real phone numbers, using fake caller IDs; may pretend to be a government agent; or try to get you to provide them personal information like a Social Security number or account numbers, according to the U.S. Senate Aging Committee. Before responding to any solicitation, ask a friend, family member or trusted financial services professional about it.

2
REPORTING A SCAM
Anyone who receives an IRS email solicitation should report and forward it to phishing@irs.gov. If called, record the alleged employee’s name, badge number, callback number and then report it to the IRS toll-free at 800-366-4484. For all other scams, commercial or even family emergency scams, file online complaints with the Federal Trade Commission at ftc.gov/complaint. The U.S. Senate Special Committee on Aging also maintains a toll-free fraud hotline at 855-303-9470.

3
HANDLING ID THEFT
Report the theft to the three major credit bureaus, contact each of your creditors, contact your bank or financial institution and report the incident to the local police or sheriff, according to the Florida Attorney General’s Office. Assistance is available by calling the AG’s toll-free fraud hotline for all fraud victims at 866-966-7226. The AG also offers an online ID theft victim’s kit at myfloridalegal.com. Go to “About the Office; Services; Identity Theft.”