

Free Tax Preparation

Free tax help may be closer than you think

What to Bring:

- Proof of identification (photo ID)
- Social Security cards or Individual Taxpayer Identification Numbers (ITIN) for you, your spouse, and/or dependents
- Proof of foreign status, if applying for an ITIN
- Birth dates for all on the tax return
- For married filing joint, both spouses must be present
- All Forms W-2, W-2G, 1099 and 1098
- A copy of last year's federal and state returns
- Proof of bank account and routing information if choosing direct deposit of refund (e.g. voided check)
- Total paid to daycare provider and their tax ID
- Health insurance exemption certificate, if received
- All Forms 1095 Health Insurance statements

One-on-one Tax Return Preparation Services (VITA/TCE)

Each year, the Volunteer Income Tax Assistance (VITA) and the Tax Counseling for the Elderly (TCE) programs offer free, face-to-face tax help to people with low-to-moderate income. IRS-tax law certified volunteers provide this free service with electronic filing to all people who qualify. All you have to do is bring your documentation, and we'll do the rest.

APPOINTMENTS AVAILABLE FEBRUARY 3 – APRIL 13, 2020

Mondays – 9am to 3pm
Tuesdays – 1pm to 6pm
Wednesdays – 10am to 2pm
Thursdays – 9am to 3pm
Select Saturdays – 8am to 2pm

Make plans to come see us soon! We will be glad to assist you with your tax preparation needs.

APPOINTMENT SCHEDULING BEGINS JANUARY 20, 2020
Make your appointment by calling 219.464.3583 ext. 108 or booking online at www.unitedwaypc.org.

**YOUR LOCAL VITA LOCATION
UNITED WAY OF PORTER COUNTY**
951 Eastport Centre Dr.
Valparaiso, IN 46383

VITA/TCE

Get more details on VITA and TCE by going to www.irs.gov and typing VITA in the search box and clicking on "Free tax return preparation for you by volunteers."



IRS Certified Volunteers Providing

FREE TAX PREPARATION

IRS VITA/TCE return preparation sites are operated by certified volunteers. Site operating hours and services offered may be limited. In addition, by law, some sites provide priority services to seniors. Please be advised that you may not be immediately served. Your patience and understanding are appreciated.

Will Prepare

- Wages, salaries, etc. (Form W-2)
- Interest Income (Form 1099-INT)
- Dividends Received (Form 1099-DIV)
- State Tax Refunds (Form 1099-G)
- Unemployment Benefits (Form 1099-G)
- IRA Distributions (Form 1099-R)
- Pension Income (Forms 1099-R, RRB-1099, CSA-1099)
- Social Security Benefits (Form SSA-1099)
- Simple Capital Gain/Loss (Form 1099-B)
- Sale of Home (Form 1099-S) *limited*
- Self-employed Income (Form 1099-MISC) *limited*
- Gambling Winnings (Form W-2G)
- Cancellation of Debt (Form 1099-C) *limited*
- Health Savings Accounts (Form 1099-SA) *limited*
- Itemized Deductions *limited*
- Education Credits (Form 1098-T)
- Child Tax Credit
- Earned Income Credit
- ACA Statements (Forms 1095-A, B or C)
- Prior Year and Amended Returns *limited*

Will Not Prepare

- Schedule C with losses
- Complicated Schedule D (capital gains and losses)
- Form SS-5 (request for Social Security Number)
- Form 8606 (non-deductible IRA)
- Form 8615 (minor's investment income)
- Form SS-8 (determination of worker status for purposes of federal employment taxes and income tax withholding)
- Parts 4 & 5 of Form 8962 (Premium Tax Credits)



Please see a professional preparer for assistance with complicated returns.

What to Bring

- For married filing joint, both spouses must be present
- All Forms W-2 and 1099
- Information for other income
- Information for all deductions/credits
- A copy of last year's tax return
- Proof of account for direct deposit of refund
- Social Security cards or Individual Taxpayer Identification notices/cards for you, your spouse, and/or dependents
- Proof of identification for yourself and/or your spouse
- Total paid to day care provider and their tax ID number
- Birth dates for you, spouse and/or dependents on the return
- Proof of foreign status if applying for ITIN
- Forms 1095-A, B or C (ACA Statements)
- For prior year returns, copies of income transcripts from IRS (and state, if applicable)



IRS e-file is fast, more accurate, secure, and simple.