



Volunteer Income Tax Assistance (VITA)

Tax Preparation Hours at United Way of Porter County

The following is the 2018 tax year preparation schedule for the United Way of Porter County site at:
951 Eastport Centre Drive, Valparaiso, IN 46383.

Maximum Adjusted Gross Income (AGI) for 2018 is \$54,000

Call for an appointment: (219) 464-3583 x108

Make your own appointment at our website: www.unitedwaypc.org/VITA

Monday, February 4, 2019 through Thursday, April 11, 2019

- Mondays:** 9 am to 3 pm
Tuesdays: 1 pm to 5
Wednesdays: 10 am to 2 pm
Thursdays: 9 am to 3 pm
Saturdays: 8 am to noon (February 16 & 23, March 9, 23 & 30, & April 6 only)

The items listed below are required for us to do your taxes.

Failure to have the proper documents could delay preparation of your return.

- Proof of identification (photo ID)
- **Social Security cards** for you, your spouse and dependents (***Medicare cards are no longer accepted.***)
- An Individual Taxpayer Identification Number (ITIN) assignment letter may be substituted for you, your spouse and your dependents if you do not have a Social Security number
- Proof of foreign status, if applying for an ITIN
- Birth dates for you, your spouse and dependents on the tax return
- Wage and earning statements (Form W-2, W-2G, 1099-R, 1099-Misc) from all employers
- Interest and dividend statements from banks (Forms 1099)
- All Forms 1095, Health Insurance Statements
- Health Insurance Exemption Certificate, if received
- A copy of last year's federal and state returns, if available (Need AGI for your 2017 federal return)
- Proof of bank account routing and account numbers for direct deposit such as a blank check
- To file taxes electronically on a married-filing-joint tax return, both spouses must be present to sign the required forms
- Total paid for daycare provider and the daycare provider's tax identifying number such as their Social Security number or business Employer Identification Number
- Forms 1095-A, B or C, Affordable Health Care Statements
- Copies of income transcripts from IRS and state, if applicable and proof of County property tax or rent paid **A**

[more complete list of items to bring is on the reverse side.](#)



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.