



FREE

VIRTUAL Volunteer Income Tax Assistance (VITA) 2020 Tax Year FREE Tax Preparation Procedures

951 Eastport Centre Drive, Valparaiso, IN 46383.

The Maximum Adjusted Gross Income (AGI) limit to qualify for 2020 is \$57,000

- 1) **Pick up a VITA Tax Preparation packet at any Porter County Public Library branch or any Westchester Public Library branch. Packets are also available on-line on the United Way VITA tax page. www.unitedwaypc.org/vita**
- 2) **You must fill out ALL of the forms in the packet:**
 - a) **Authorization for virtual tax preparation (14446)**
 - b) **Intake/Interview form 13164C**
 - c) **Indiana questionnaire**
 - d) **Consent to Disclose Personal Tax Return Information form**
 - e) **Consent to Use Personal Tax Return Information form**
- 3) **Call for an appointment once you have completed these forms:
219-464-3583 x108**
- 4) **When you come for your drop off appointment bring the following:**
 - a) **Your completed packet**
 - b) **COPIES of all of your tax documents (see below)**
 - c) **Original social security cards or original Form 1099SSA for everyone on your return**
 - d) **Original photo ID for you and spouse if applicable**

If social security cards are lost apply for new cards with the Social Security Administration.

We can't set an appointment until you have all original documents in your possession.

YOUR SOCIAL SECURITY CARDS AND PHOTO IDS WILL BE RETURNED AT YOUR APPOINTMENT.

- 5) **Pull into one of the 4 labeled VITA parking spots. Call the phone listed on the sign and follow instructions.**

When return is complete you will be called to set up a brief return visit to:

- a) **Sign form 8879 giving authorization for your taxes to be filed electronically (if filing jointly both parties must be present), and**
- b) **Receive a printed copy of your return**

You are responsible for providing authentic copies of your tax documents either with your own personal copier or from public outlet such as the Porter County Public Library, or firms offering copy services like Staples. Any costs associated with this copying requirement is at the expense of you the taxpayer

Without the proper document COPIES we can't prepare your return.

- Wage and earning statements (Form W-2, W-2G, 1099-R, 1099-NEC, 1099-Misc) from all employers
- Interest and dividend statements from banks (Forms 1099)
- Form 1095-A, Health Insurance Statement (if purchased from the Affordable Care Act marketplace)
- Proof of bank account routing and account numbers for direct deposit such as a voided copy of a blank check
- Total paid for daycare provider and the daycare provider's tax identifying number such as their Social Security number or business Employer Identification Number
- Proof of foreign status, if applying for an ITIN
- If this is the first time you are having your taxes provided by the program, a copy of your 2019 taxes would be helpful in completing your 2020 return.

CDC protocols will be enforced. While you may not need to enter the building we are requiring you wear a face mask when approached by our volunteers. If you are required to enter the building you will need to have your temperature taken, wear a mask and maintain 6 feet of distance. No public rest rooms will be available as our building is closed.

We are working diligently to make this service available to you during this very difficult time. Thank you for your patience and cooperation!