

Free Tax Preparation Fact Sheet

GET FREE TAX PREPARATION HELP FROM IRS CERTIFIED VOLUNTEERS

IRS Volunteer Income Tax Assistance (VITA) and the Tax Counselling for the Elderly (TCE) programs offer free tax help for taxpayers who qualify. Site operating hours and services offered may be limited so please search the IRS locator to determine the locations and hours available in your community.

To locate an IRS Volunteer Income Tax Assistance (VITA) and the Tax Counseling for the Elderly (TCE) programs in your area go to <http://irs.treasury.gov/freetaxprep/>

SERVICES THAT MAY BE PROVIDED

The following are the services that may be provided in your community including:

- wages, salaries (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-employment 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



VITA/TCE WILL NOT PREPARE

- Schedule C with losses
- Complicated Schedule D (capital gains and losses)
- Forms 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)

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)

*The information in this fact sheet is derived from Publication 3676-B (EN-SP) (Rev. 10-2015)
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