

# Free Tax Return Preparation for Qualifying Taxpayers

## TVCCA FINANCIAL SERVICES PROGRAMS

**\*\*\*\*\*Appointments can be scheduled starting January 11 using our 2-1-1 scheduling system by dialing 2-1-1 and selecting option 3, then option 6**

The IRS's Volunteer Income Tax Assistance (VITA) and Tax Counseling for the Elderly (TCE) programs offer free basic tax return preparation to qualified individuals.

The VITA program has operated for over 50 years. VITA sites offer free tax help to people who need assistance in preparing their own tax returns, including:

People who generally make \$60,000 or less

Persons with disabilities; and

Limited English-speaking taxpayers

In addition to VITA, the TCE program offers free tax help, particularly for those who are 60 years of age and older, specializing in questions about pensions and retirement-related issues unique to seniors.

While the IRS manages the VITA and TCE programs, the VITA/TCE sites are operated by IRS partners and staffed by volunteers who want to make a difference in their communities. The IRS-certified volunteers who provide tax counseling are often retired individuals associated with non-profit organizations that receive grants from the IRS.

VITA/TCE services are not only free, they are also a reliable and trusted source for preparing tax returns. All VITA/TCE volunteers who prepare returns must take and pass tax law training that meets or exceeds IRS standards. This training includes maintaining the privacy and confidentiality of all taxpayer information. In addition to requiring volunteers to certify their knowledge of the tax laws, the IRS requires a quality review check for every return prepared at a VITA/TCE site prior to filing. Each filing season, tens of thousands of dedicated VITA/TCE volunteers prepare millions of federal and state returns. They also assist taxpayers with the preparation of thousands of Facilitated Self-Assistance returns.

### What you need to Bring to your Appointment

- Proof of identification (photo ID)
- Social Security cards for you, your spouse and dependents
- 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)
- Health Insurance Exemption Certificate, if received
- A copy of last year's federal and state returns, if available
- 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 and C, Health Coverage Statements
- Copies of income transcripts from IRS and state, if applicable