

# FREE TAX PREP

## ITEMS TO BRING

- 1) **Photo ID** (for both spouses, if filing jointly)
- 2) **Original** copies of Social Security Cards or ITINs for everyone on the tax return
- 3) **Proof of Income** (W2 for each employer, 1099s, Social Security Income, Retirement Income, Unemployment, Interest, Cash Income etc.)
- 4) **Proof of Expenses if Claiming** (Childcare, 1098-T for education expenses, itemized statement from post-secondary institution, medical, property tax, written record of mileage, charitable donation receipts, itemized deductions, etc.)
- 5) **Both spouses must be present** if filing a joint return
- 6) **Proof of Health Insurance** (If you have coverage through Healthcare.gov, commonly known as the Marketplace or "Obamacare", we need Form 1095-A)
- 7) **Identity Protection Pin Number** if you have been issued one from the IRS or had your identity stolen.

## HELPFUL ITEMS

- 1) Last year's tax return- we no longer have access to returns filed in prior years!
- 2) Direct deposit information - bank account number and routing number
- 3) Forms 1095B or 1095C if you have them

## WE CANNOT PREPARE

- 1) Returns with household income over \$66,000
- 2) Schedule C with losses - No business loss
- 3) Business expenses more than \$25,000
- 4) Complicated and Advanced Schedule D (*capital gains and losses*)
- 5) Rental or Farm Income
- 6) Certain travel and auto deductions
- 7) Returns with business inventory, depreciation, home office deduction, self-employed health insurance coverage deduction
- 8) Certain other limitations on complicated tax law. This can vary from site to site.
- 9) Returns with Marketplace shared policy allocations or alternative calculation for year of marriage eligibility

## TWO OPTIONS

- 1) Use the FREE do-it-yourself online tax preparation software with the option to have your refund deposited directly into your bank account. To get started, go to: **UnitedWayFileFree.com**.
- 2) A VITA walk-in or appointment site will prepare your return for you.

DIAL 2-1-1 OR VISIT

**UNITEDWAYFILEFREE.COM**

FREE FOR HOUSEHOLDS EARNING LESS THAN \$66,000 IN 2017.



**CALL**

DIAL 2-1-1 OR  
1-800-318-9335



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TO 898-211



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VITA  
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PREP



Presented in partnership with the IRS.