



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 IRB (and state, if applicable)~~



Site Name: **Mt. SAC VITA**

Location:

Days:

Hours:

Please refer to our website.



IRS e-file is fast, more accurate, secure, and simple.