



# 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, tips, etc. (Form W-2)
- Interest and dividends (Forms 1099-INT, 1099-DIV)
- Retirement income (Forms 1099-R, Form SSA-1099, RRB-1099, RRB-1099-R, CSA-1099)
- Capital gain/loss (Form 1099-B), *limited Schedule D*
- State tax refunds and unemployment benefits (Form 1099-G)
- Self-employed income (Forms 1099-NEC, 1099-K), *limited Schedule C*
- Gambling winnings (Form W-2G)
- Cancellation of debt (Form 1099-C), *limited*
- Health savings accounts (Form 1099-SA), *limited*
- Adjustments to income and itemized deductions, *limited*
- Education credits (Form 1098-T)
- Premium tax credit (Form 1095-A)
- Child tax credit, earned income credit, and other miscellaneous credits
- Application for individual taxpayer identification number (ITIN) (Form W-7)
- Sale of Home (Form 1099-S), *limited*
- Prior Year and Amended Returns, *limited*
- Foreign students and scholars, *limited (select sites only)*

### Will Not Prepare\*

- Schedule C with net loss, depreciation or business use of home
- Complex Schedule D, Capital Gains and Losses
- Forms 8615, 8814 (*children's unearned income*)
- Form SS-8 (*determination of worker status for purposes of federal employment taxes and income tax withholding*)
- Parts 4 & 5 of Form 8962 (*Allocation of Policy Amounts, Alternative Calculation for Year of Marriage*)
- Returns with casualty/disaster losses

\*See a volunteer for other items not listed



**Please see a professional preparer for assistance with complicated returns.**

### What to Bring

- For married filing jointly, both spouses must be present
- Original photo identification such as driver's license, school, employer, military, or state ID for you and your spouse (*if married*)
- Social Security cards or Individual Taxpayer Identification Number documents for you, your spouse, and dependents
- Birth dates for you, spouse, and dependents
- A copy of last year's tax return
- All Forms W-2 and 1099
- Form 1095-A, if applicable
- Information for other income
- Information for all deductions and credits
- Total paid to daycare provider and their tax ID number
- For direct deposit of refund, proof of account and bank's routing number
- For prior year returns, copies of income transcripts from IRS (*and state, if applicable*)



Scan this code with your smart device or visit [www.irs.gov/vita](http://www.irs.gov/vita) to learn more about free tax return preparation.

**Site Name:**

**Location:**

**Days:**

**Hours:**



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