

FREE TAX PREPARATION - SUMMER PROGRAM

BY APPOINTMENT ONLY – TAX YEARS 2014, 2015, AND 2016 ONLY

May 1 – September 22, 2017

Northwest Indiana Community Action
5240 Fountain Drive, Crown Point

Earn It! Keep It! Save It!

IRS trained and certified community volunteers give free assistance to taxpayers whose household income is less than \$54,000. We prepare and file your federal and state income tax returns at no cost to you.

The VITA program:

1. Ensures that you receive all tax benefits for which you are eligible, including the Earned Income Tax Credit (EITC)
2. Eliminates the fees charged by commercial preparers and rapid refund loans
3. Provides access to resources that can put your money to work for you

Northwest Indiana



A\$\$et Building Campaign

What To Bring With You To File Your Taxes

- **Proof of identification** (each person filing needs a valid driver's license or State ID)
- **Birth dates for you, your spouse and dependents on the tax return**
- **Social Security Cards** for you, your spouse and dependents and/or a Social Security Number verification letter issued by the Social Security Administration; or
- Individual Taxpayer Identification Number (ITIN) letter for you, your spouse and dependents, if applicable
- A list of who on your tax return had **health insurance coverage** for all years being filed and which months they were covered (provide this if you did not receive Form 1098-B or 1095-C). **Marketplace participants must bring their 1095-A.**
- A copy of last year's federal and state returns *if available*
- Bank routing numbers and account numbers for Direct Deposit (a blank voided check)
- Total paid for daycare provider and the daycare provider's tax identifying number (the provider's Social Security Number or the provider's business Employer Identification Number)
- To file taxes electronically on a **married-filing-joint tax return**, **both spouses must be present to sign the required forms**
- Copy of the settlement statement if claiming the homebuyers credit
- Record of rent payment, landlord's name and address/mortgage company statements
- Proof of real estate tax paid for the years being filed
- Students receiving the educational tax credit need to provide a 1098-T and their student account statement

We are able to prepare	We are unable to 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 (Form 1099-R, RRB-1099, CSA-1099) Social Security Benefits (SSA-1099-B) Simple Capital Gain/Loss (Form 1099-B) Sale of Home (1099-S) <i>limited</i> Self-employed Income (Form 1099-MISC) <i>limited</i> Gambling Winnings (Form W-2G) Cancellation of Debt (Form 1099-C) <i>limited</i> Health Savings Accounts (Form 1099-SA) <i>limited</i> Itemized Deductions <i>limited</i> Education Credits (Form 1098-T) Child Tax Credit Earned Income Credit Affordable Health Care Statements (Forms 1095-A, B or C) Prior Year and Amended Returns <i>limited</i>	Schedule C with losses Complicated & advanced 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 purposed of federal employment taxes and income tax withholding) Rental property Health Insurance- Shared Policy Allocation
<p><u>If you have items that are marked "limited" please inform the person who is scheduling your appointment to assure we are able to properly prepare your return</u></p> <p>To schedule an appointment, call 219-794-1829, ext. 2233</p>	