

Why pay for TAX PREP?

Let our **EXPERTS** do it for you – for **FREE!**



The VITA Program is sponsored by the IRS and United Way Bay Area

If your annual household income is **\$56,000** or less, visit our **FREE TAX PREP sites!!!**

You may qualify for more than \$6,000 in refunds from the California and Federal Earned Income Tax Credits!

LOCATION	DAY(S) & HOURS OF OPERATION	TYPE OF SERVICE
<u>Fremont Family Resource Center</u> 39155 Liberty Street Building EFGH Fremont, CA 94538	January 22 to April 15, 2020 Wednesdays: 4:00 to 8:00 pm Thursdays: 4:00 to 8:00 pm Fridays: 10:00 am to 1:00 pm *Wed, April 15, 2020 – 10 am to 7 pm*	Walk-In <i>*Free on-site childcare provided on a first come basis; space is limited*</i>
<u>New Haven Adult School</u> 600 G Street (Entrance on H Street) Union City, CA 94587	January 25 to April 11, 2020 Saturdays: 10:00 am to 1:30 pm *Closed Saturday, March 14, 2020*	* Walk-In * Self-Prep (need to bring a copy of last year's tax return)
<u>Ohlone College Tri-Cities Career Center</u> 39399 Cherry Street, Room 1211 Newark, CA 94560	January 28 to April 14, 2020 Tuesdays: 11:00 am to 3:00 pm	By appointment only. To access the on-line scheduler, go to www.fremontvita.org

**** Please note, if we reach capacity we will close our doors early ****

SAVE FOR AN OPPORTUNITY TO WIN \$100 and/or \$10,000

Tax time is the perfect time for savings! Start now and save for emergencies or a financial goal (college education, dream home, vacation, retirement, etc.).

When you split your federal refund and save at least \$50, you'll be entered into local and national raffles for weekly and monthly drawings of \$100. There's also an opportunity to enter a \$10,000 drawing!

VITA staff will help you save a portion of your refund & enroll you in the raffle drawings!

For more information, call SparkPoint Fremont at (510) 574-2020 or visit www.fremontvita.org

EarnIt!
KeepIt!
SaveIt!



SEE OTHER SIDE FOR A LIST OF REQUIREMENTS & ADDITIONAL INFORMATION



YOU NEED TO BRING

- For each person listed on the return:
 - Social Security card or Individual Taxpayer Identification Number (ITIN)** card or letter. Go to <https://www.irs.gov/newsroom/get-ready-for-taxes-renew-expiring-itins-now-to-file-a-return-next-year> to verify that your ITIN has not expired.
 - MUST KNOW** birthdates for everyone listed on tax return
- Photo identification** (for you and your spouse, if filing jointly)
- Copy of Previous Year's Return (preferred)**
- Routing and account number for savings and checking accounts** or a voided check, and/or pre-paid debit card for direct deposit
- Income statements or forms like the following:
 - Wages from each job (W-2)
 - Interest (1099-INT)
 - Dividends (1099-DIV)
 - Retirement Plans (1099-R)
 - Gambling Winnings (W-2G)
 - Unemployment (1099-G)
 - Social Security Benefits (SSA-1099)
 - Miscellaneous Income (1099-MISC)
 - Sale of Stock (1099-B)
 - Tuition (1098-T) and detailed student account statement of expenses paid to university/college
 - Health Insurance Information (1095-A, B, or C)

BRING IF IT APPLIES TO YOU:

- 2019 Identity Theft PIN Letter from IRS
- Records of charitable contributions
- Homeowner mortgage interest (1098)
- Property tax bill
- DMV registration form
- Interest you paid on student loans (1098-E)
- Day care expenses you paid for your children; bring provider's name, address, & tax ID or Social Security Number, and phone number
- Business incomes and expenses, including mileage log(s)
- UBER & Lyft tax summary page

APPOINTMENTS NEEDED FOR THE FOLLOWING

- Foreign Student with Visa F,J,M or Q
- You sign ASL
- Sale of principal residence
- 16+ Stock Transactions

**For appointments call
Jane O'Hollaren at (510) 574-2026**

WE CANNOT PREPARE THE FOLLOWING TAX RETURNS:

- Foreclosure/Short Sale
- IRA to Roth Conversions
- Sale of stocks acquired by stock options
- Loan Modification
- Married Filing Separately
- Out of State Income
- Rental Income
- Self-employment & sole proprietor business with expenses over \$25,000, depreciation, losses, or office in the home
- 1040NR (non-resident alien), with the exception of Foreign Student with Visa F, J, M or Q
- Expired ITIN holders need to call 211 for VITA sites with Certified Acceptance Agents

****Other situations may be out-of-scope****



Providing QUALITY service since 2002, our **IRS-CERTIFIED** tax preparers are **PASSIONATE** about taxes.

Need fast access to your money without paying additional fees? Direct deposit your refund into your bank account for faster refund. No bank account? No worries, we can help you enroll for a free pre-paid debit card at our site.