

# Why pay for TAX PREP?

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

## FREE tax preparation service via VALET VITA

**Save some time! Leave your taxes behind.**

If your annual household income is \$56,000 or less, **FREE** tax preparation drop off service is available here through the Volunteer Income Tax Assistance (VITA) Program. Leave your tax documents with us and let our IRS-certified tax preparers prepare your return. Pick up your return when it's ready!

*This program is a partnership between SparkPoint Fremont  
and Union City Family Center*

**Location:** Union City Family Center  
725 Whipple Road  
Union City, CA 94587

**When:** Tuesdays – 10:30 am to 5 pm  
January 28 to April 14, 2020

**Type of Service:** *Walk-in drop off site only*



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

Please bring your bank account routing & account numbers for savings and checking accounts, and ask your VITA team member how you can enter the **Save Your Refund** raffle drawings!

Please see other side for more 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)
- Routing & account number for savings and checking accounts or a voided check, and/or pre-paid debit card for direct deposit
- **Copy of Previous Year's Return (preferred)**
- 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)
  - Health Insurance Information (1095-A, B, or C). Must have full year health coverage.

**PLEASE VISIT ONE OF OUR VITA SITES FOR ASSISTANCE  
IF YOU HAVE THE FOLLOWING:**

Visit [www.fremontvita.org](http://www.fremontvita.org) for a list of our VITA sites.

- 1098-T with education expenses
- 1099-MISC or Cash Income WITH EXPENSES
- If you own a home and have itemized deductions:
  - Mortgage interest (Form 1098)
  - Medical & dental expenses (including insurance premiums)
  - Taxes (State, real estate, personal property, sales)
  - Charitable contributions

## **BRING IF IT APPLIES TO YOU:**

- 2019 Identity Theft PIN Letter from IRS
- 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

## **WE CANNOT PREPARE TAX RETURNS FOR THE FOLLOWING SITUATIONS:**

- 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, depreciation, losses, or office in the home
- 1040NR (non-resident alien)
- Expired ITIN holders need to call 211 for VITA sites with Certified Acceptance Agents

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