



What to Bring to Your Local VITA Site!

- For married filing joint returns, both Taxpayer and Spouses must be present to sign the tax returns before it is electronically filed.
- Proof of photo identifications (need both Taxpayer and Spouse for Married Filing Joint Returns)
- Social Security cards or ITIN and Birth dates for you, your spouse and dependents on the tax return
- A copy of last year's tax return
- Proof of foreign status, if applying for an ITIN
- Wage and earning statements (Form W-2, W-2G, 1099-R, SSA-1099, 1099-Misc) from all employers
- Interest and dividend statements (Forms 1099-INT, 1095-DIV)
- Information for all other income
- Documents for medical deductions, property taxes paid, mortgage interest, auto registration, charity contributions and work expenses.
- Total paid to day care provider, their tax ID number and address
- Forms 1095-A (Healthcare Marketplace), 1095-B or 1095-C
- Copies of income transcripts from IRS and state, if applicable
- Proof of bank routing and account number for Direct Deposit



A New Leaf Values our Partnership with





What West Valley VITA sites can do for you today.

We're here to help low- to moderate-income taxpayers, especially those 50 and older. A New Leaf VITA volunteers are trained to assist you in filing certain tax forms and schedules, including the Form 1040. However, the Volunteer Protection Act requires that our volunteers stay in the scope of the program. If volunteers feel they do not have adequate knowledge or your return is too complex, you may need to seek another qualified volunteer or will need to seek professional help.

We can prepare

- **Form 1040** with Schedules A, B, D and E
- **Schedule C** if no employees, no inventory, no losses or depreciation or expenses for business use of home, etc.
 - **1099-MISC (box 7)** – nonemployee compensation is reported on Schedule C/CEZ)
- **Schedule EIC and EIC Worksheets**
- **1099-MISC (box 1 or 2)**— rents, royalties, reported on Schedule E with no expenses, depreciation)
- **1099-MISC (box 3)** – other income is reported on 1040 Line 21)
- **Form 1040-ES** (Estimated Payments)
- **Form 2441** (Child & Dependent Care)
- **Form 5405** (Repayment of First Time Home Buyers Credit)
- **Form 8283**, Section A, Part 1—non-cash contributions to charity limit of \$500.
- **Form 8379** (Injured Spouse)
- **Form 8812** (Additional Child Tax Credit)
- **Form 8880** (Qualified Savings Credit)
- **Form 8888** (Allocation of Refund – Split refund)
- **Form 8863** (Education Credits)
- **Form 9465** (Installment Agreement)
- **Form 1040X** (Amended Returns, if trained in the tax year being amended)
- **Schedule K-1** that provides information only for interest, dividends and capital gain distributions and royalties (Schedule B, D, E)
- **Cancellation of Mortgage Debt—1099-A and/or 1099-C and Form 982 or 1099-C for Credit Card Debt.** (Riverboat Bingo Site Only! – case by cases)
- **Health Savings Accounts—1099-SA and Form 8889**, if trained and certified*
- * **HSA:** Only volunteers who have been certified may prepare returns containing HSA.

We cannot prepare

- **Married Filing Separate**
- **Schedule C:**
 - Hobby income or not-for-profit activity
 - Inventory
 - Expenses exceed \$25,000
 - Cost of Goods sold
 - Expenses for employees
 - Business use of home
 - Depreciation or asset write-offs
 - Casualty losses
 - Accrual Methods of accounting
 - Net losses
- **1099-R, Box 7:** Code 2 with IRA/SEP/SIMPLE box is checked, 5, 6, 8, 9, A, E, J, K, N, P, R, T, U, & W
- **1099-C:** Credit Card Debt (most sites)
- **Schedule D:** Complicated and advanced Capital Gains and Losses
- **Schedule E:** Sales of Rental Property
- **Schedule F:** Farm Income
- **Form 8606:** Non-Deductible IRA
- **Form 8615:** Minor's Investment Income
- **Form SS-5:** request for Social Security
- **Form SS-8:** Worker Status Determination
- **Schedule K-1:** that involves depreciation or deductible expenses
- **Non-Cash Charitable donation over \$500 (if itemizing)**



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A NEW LEAF

WEST VALLEY VITA COALITION 2016-17 TAX SEASON VITA SITES



	Site	Site Address	Days & Hours	Dates
1	A New Leaf	8802 N. 61st Avenue Glendale, AZ 85302zs	Tuesdays 11 am - 3 pm	Tuesdays Jan. 24 - Apr. 11, 2017
2	ASU West Campus	4701 W. Thunderbird Road CLCC 238 Glendale, AZ 85306	Thursdays: 4 pm - 8 pm & Saturdays: 10 am - 2 pm	Thursdays: Jan. 26 - Apr. 13, 2017 Saturdays: Jan. 28 - Apr. 15, 2017 Closed Mar. 9th & Mar. 11th
3	Buckeye - EMCC	902 E. Eason Avenue Mondays: Room #134 Thursdays: Room #132 Buckeye, AZ 85326	Mondays: 1 pm - 4 pm & Thursdays: 5 pm - 8 pm	Mondays: Jan. 23 - Apr. 17, 2017 Thursdays: Jan. 26 - Apr. 13, 2017 Closed on Feb. 20th & Mar. 16th
4	Care1st Avondale Resource & Housing Center	328 W. Western Avenue Avondale, AZ 85323	Tuesdays: 5 pm - 7 pm & Saturdays: 9 am - 1 pm	Tuesdays: Jan. 24 - Apr. 11, 2017 & Saturdays: Jan. 28 - Apr. 15, 2017
5	Citadel of Praise	8738 W. Cholla Street Suites 1 - 3 Peoria, AZ 85345	Saturdays 9 am - 1 pm	Saturdays: Jan. 28 - Apr. 15, 2017
6	Estrella Mountain Community College	3000 N. Dysart Road Ocotillo Hall Room # OCT 120 Avondale, AZ 85392	Fridays: 12 pm - 3 pm & Saturdays: 9 am - 1 pm	Fridays: Jan. 27 - Apr. 14, 2017 Saturdays: Jan. 28 - Apr. 15, 2017 Closed on Feb. 4th, Closed on Mar. 17th & 18th
7	Glendale Elementary School District Office	7301 N. 58th Avenue Room #18 Glendale, AZ 85301	Wednesdays 5 pm - 8 pm	Wednesdays Jan. 25 - Apr. 12, 2017
8	Riverboat Bingo	18300 W. Bell Road Surprise, AZ 85374	Wednesdays 11 am - 3 pm	Wednesdays Jan. 25 - Apr. 12, 2017
9	Scottsdale Community College	9000 E. Chaparral Road Room # LIB 463 (NW corner of the library) Scottsdale, AZ 85256	Thursdays: 4 pm - 8 pm & Saturdays: 9 am - 1 pm	Thursdays: Jan. 26 - Apr. 13, 2017 Saturdays: Jan. 28 - Apr. 15, 2017 Closed Mar. 16th & Mar. 18th
10	Surprise Resource Center	12425 W. Bell Road Bldg. A, Suite #124 Surprise, AZ 85378	Mondays: 4 pm - 8 pm & Thursdays: 9 am - 1 pm	Mondays: Jan. 23 - Apr. 17, 2017 Thursdays: Jan. 26 - Apr. 13, 2017 Closed Feb. 20th
11	Surprise Senior Center	15832 N. Hollyhock Street Surprise, AZ 85378	Tuesdays: 4 pm - 8 pm	Tuesdays: Jan. 24 - Apr. 11, 2017

You earned your money. Keep more of it.

File your taxes **FOR FREE**

WHAT YOU NEED

- Social Security or Individual Taxpayer Identification Number (ITIN) for each family member and working adult.
- 1095-A if you received a tax credit from the healthcare.gov marketplace.
- Childcare provider name, address and tax ID, if applicable.
- Bank routing and account numbers for checking or savings account (if you qualify for refund via secure direct deposit).
- Last year's tax return, if you have it.
- A valid email address.
- W-2s, 1099s, 1098s and other income forms.

DON'T LEAVE MONEY ON THE TABLE.

Nearly 70% of U.S. tax filers qualify to use MyFreeTaxes. Available in all 50 states and the District of Columbia, MyFreeTaxes is easy, safe – and **free**.

Here's how to file for free:

1. Online at MyFreeTaxes.com, powered by H&R Block®, if your household income was \$64,000 or less in 2016.
2. In-person with an IRS-certified volunteer income tax preparer if your household income was \$54,000 or less in 2016.

Questions? Call our free helpline at 1-855-My-Tx-Help (1-855-698-9435).

Visit MyFreeTaxes.com and file your taxes for free today!



Visit a Volunteer Income Tax Assistance (VITA) site. Find one at <http://irs.treasury.gov/freetaxprep/>

MyFreeTaxes is committed to providing free tax preparation services to all taxpayers. If you need ADA accommodation, contact your local in-person filing site or call 1-855-My-Tx-Help (1-855-698-9435).



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