2021 is a new year, and we have new rules. Please read these carefully.

We have new eligibility guidelines. Call 211 to be screened for eligibility

Household Size	and income
1	$ 19,140.00
2	$ 25,860.00
3	$ 32,580.00
4	$ 39,300.00
5	$ 46,020.00
6	$ 52,740.00

After you make an appointment remember:

If you forget or can't find any required documents, you will need to call 211 and reschedule your appointment. We will not be making any exceptions for any of these rules. Don't risk it, we are seeing very few clients this year because of COVID 19.

**If you cannot keep your appointment,
please call 211 and reschedule.
We will not reschedule for NO SHOWS**

___Are you a retiree with capital gains?
___Do you have a dependent student who is applying for education credits?
___Did you receive investment income from an account broker?
___Do you have any rental income or own rental property?
___Have you filed for bankruptcy in the tax year you wish to file?

If you said YES to any of this or are at a higher income, we can NOT prepare your taxes.

GENERAL RULES FOR THE VITA TAX SITE

You must **bring your spouse** if filing jointly, and **no children** are allowed unless they are translating for you.

Wear a mask; volunteers will check your temperature when you arrive.

NO sacks or bags full of documents and receipts allowed. **Organize your documents and bring only what you need**. Use the checklist provided.

No waiting in the building. You will need to wait in your car.

We will not look up or print off any documents at the tax site.

Call 211 for more information

CALL 211 TO BE SCREENED FOR ELIGABILITY
AND TO MAKE AN APPOINTMENT
WE WILL NOT ACCEPT WALK INS CLIENTS

<u>CHECKLIST OF ITEMS TO BRING TO YOUR TAX APPOINTMENT</u>
<u>Please do not ask us to make exceptions, we will not. These are IRS rules.</u>

1. PERSONAL INFORMATION

___Picture ID for you and your spouse

___Birthdate for all persons listed on the tax return

___Social Security card or Individual Tax Identification Number (ITIN) card or letter for all persons listed on the tax return

___Routing and account numbers for your savings account or checking account (blank cancelled check)

2. YEAR-END INCOME STATEMENTS

___W-2s for **EVERY** job you worked in 2020

___1099 forms for retirement, Social Security, unemployment, and interest

___Unemployment statements or forms

___Notice 1444 or the check stub for the Economic Impact Payment

3. EDUCATION AND CHILD CARE CREDITS

___Student loan interest statement (Form 1098-E)

___Childcare expenses: Provider name, address, and tax ID or Social Security number

4. PROPERTY TAX

___Homeowners: Mortgage interest and real estate taxes paid.

5. ADDITIONAL DOCUMENTS

___previous year's tax return

___Verification of health insurance if purchased through the marketplace (Form 1095-A)

___Record of charitable donations

___the PIN that the IRS sent you if you were a victim of identity theft or fraud.

___<u>The tax packet you received from 211 when you made your appointment</u>

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VITA
VOLUNTEER INCOME TAX ASSISTANCE