A logo for a neighborhood services

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VITA ELIGIBILITY & DOCUMENTATION OVERVIEW

VOLUNTEER INCOME TAX ASSISTANCE SERVICE SUMMARY

The VITA grant program, an IRS initiative, aids underserved communities by offering free tax preparation services. It supports low- to moderate-income individuals, persons with disabilities, the elderly, and limited English speakers in filing their taxes annually. **If your income was $64k or below last year, you qualify!** Through Haven Neighborhood Services' VITA program, the LMI community can file accurate and timely tax returns at no cost, delivered in a culturally responsive and linguistically sensitive manner.

DOCUMENTS NEEDED

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| * For married filing joint, both spouses MUST be present * Government issued photo identification for you and your spouse (if married) (can’t be expired) * Original Social Security Cards or Individual Taxpayer Identification Number (ITIN) / cards for **yourself, your spouse, and dependents.** * Birth dates for you, spouse, and/or dependents * A copy of last year's tax return (*optional*) * All forms W-2 and 1099, Information for other income * Health Insurance Statements: Forms 1095-A, B or C (ACA Statements) | * Information for all deductions (including charitable contributions)/credits * Total paid to daycare provider and their tax ID number * For direct deposit of refund, proof of account and bank’s routing number * For prior year returns, copies of income transcripts from IRS (and state, if applicable) * Applies **only** if you’re filing for **2021 Tax Year:** * Notice 1444-C, Your 2021 Economic Impact Payment (Stimulus, if applicable) * Letter 6419 (en-sp) - 2021 Advance Child Tax Credit Payments (if applicable) |

ELIGIBLE FILINGS

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| * Wages, salaries, etc. (Form W-2) * Interest Income (Form 1099-INT) * Dividends Received (Form 1099-DIV) * State Tax Refund (Form 1099-G) * Unemployment Benefits (Form 1099-G) * IRA Distributions (Form 1099-R) * Pension Income (Forms 1099-R, RRB-1099-R, CSA-1099) * Social Security Benefits (Form SSA-1099, RRB-1099) * Simple Capital Gain/Loss (Form 1099-B) *limited* * Sale of Home (Form 1099-S) *limited* * Prior Year and Amended Returns | * Self-Employed Income (Form 1099-MISC, Form 1099-NEC, and Form 1099-K) *limited* * Gambling Winnings (Form W-2G) * Cancellation of Debt (Form 1099-C) *limited* * Health Savings Account (Form 1099-SA) *limited* * Itemized Deductions *limited* * Education Credits (Form 1098-T) * Children Tax Credit * Earned Income Credit * Premium Tax Credit (Form 1095-A) * Form W-7 (application for Individual Taxpayer Identification Number (ITIN)) |

INELIGIBLE FILINGS

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| * Schedule C with net loss, depreciation, or business use of home * Complex Schedule D, Capital Gains and Losses * Form SS-5 (request for Social Security Number) * Form 8606 (non-deductible IRA) * Forms 8615, 8814 (children's unearned income) | * Form SS-8 (determination of worker status for purposes of federal employment taxes and income tax withholding) * Parts 4 & 5 of Form 8962 (Allocation of Policy Amounts, Alternative Calculation for Year of Marriage) * Returns with casualty/disaster losses |