



IRS Certified Volunteers Providing

FREE TAX PREPARATION

IRS VITA/TCE return preparation sites are operated by certified volunteers. Site operating hours and services offered may be limited. In addition, by law, some sites provide priority services to seniors. Please be advised that you may not be immediately served. Your patience and understanding are appreciated.

Will Prepare

- Wages, salaries, etc. (Form W-2)
- Interest Income (Form 1099-INT)
- Dividends Received (Form 1099-DIV)
- State Tax Refunds (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) *limited*
- Gambling Winnings (Form W-2G)
- Cancellation of Debt (Form 1099-C) *limited*
- Health Savings Accounts (Form 1099-SA) *limited*
- Itemized Deductions *limited*
- Education Credits (Form 1098-T)
- Child Tax Credit ** Education Credits require 2021 1098-T and school financial statements.*
- Earned Income Credit
- Health Insurance Statements (Forms 1095-A, B or C)
- Credits for Sick Leave and Family Leave for Certain Self-Employed Individuals (Form 7202)
- Economic Impact Payment (Recovery Rebate Credit)

Will Not Prepare

- Schedule C with loss, depreciation or business use of home
- Complicated Schedule D (capital gains and losses)
- Form SS-5 (request for Social Security Number)
- Form 8606 (non-deductible IRA)
- Form 8814 (child taxed at parent's tax rate)
- 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)

- Form W-7 (application for Individual Taxpayer Identification Number (ITIN))
- Returns with casualty/disaster losses

VITA (up to age 59)
My Free Taxes
Income limit \$72000
TCE (age 60 or above)
complexity limits

**Please see a
professional preparer
for assistance with
complicated returns.**

What to Bring

**A notarized Power of Attorney is required for a spouse or family member to represent a taxpayer.*

- For married filing joint, both spouses must be present
- Government issued photo identification for you and your spouse (if married)
- Social Security cards or Individual Taxpayer Identification Number documents for you, your spouse, and/or dependents
- Birth dates for you, spouse, and/or dependents
- A copy of last year's tax return
- All Forms W-2 and 1099
- Letter 6419 (en-sp) - Advance Child Tax Credit Payments

- Forms 1095-A, B or C (ACA Statements)
- Information for other income
- Information for all deductions (including charitable contributions)/credits
- Total paid to day care 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)
- Notice 1444-C, Your 2021 Economic Impact Payment

CONTACT INFO

Website address

<https://vitaloveland.org/>

EMAIL

contact@vitaloveland.org

VOICE MESSAGE

(970) 599-1794

Site Name: VLI Life Center and VLI Mobile [VITA Loveland Inc.]

Location: Life Center 1511 East 11th Street, Loveland CO 80537 / Mobile as arranged

Days: by APPOINTMENT ONLY - Feb 1 to Oct 15, 2022

Hours: by APPOINTMENT

<https://vitaloveland.org/>



IRS e-file is fast, more accurate, secure, and simple.