



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 and Form 1099-K) *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) ** Education Credits require 2023 Form 1098-T and school financial (bursar) statements.*
- Child Tax Credit
- Earned Income Credit
- Health Insurance Statements (Forms 1095-A, B or C)

Will Not Prepare

- 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)
- 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)
Income limit \$73,000
(same as IRS Free File)
TCE (age 60 or above)
complexity limitations

Please see a professional preparer for assistance with complicated returns.

What to Bring

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

- For married filing jointly, both spouses must be present
- Original photo identification such as driver's license, school, employer, military, or state id for you and your spouse (if married)
- Social Security cards or Individual Taxpayer Identification Number documents for you, your spouse, and dependents
- Birth dates for you, spouse, and dependents
- A copy of last year's tax return
- All Forms W-2 and 1099
- Forms 1095-A, B or C (ACA Statements)
- Information for other income
- 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)



Site Name: VLI Life Center and VLI Mobile (VITA Loveland, Inc.)

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

Days: Center: Monday thru Thursday - February 5 to April 18, 2024 / Mobile as arranged

Hours: Life Center: Opens 9AM; closes when daily capacity is reached / Mobile as arranged



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