

## **Curbside Free Tax Preparation at Watauga County Public Library**

### **What:**

The (VITA) Volunteer for Tax Assistance curbside program will provide free income tax preparation and electronic filing for eligible low to moderate-income tax filers. All volunteer preparers are IRS Certified.

### **Where:**

Curbside service at Watauga County Public Library, 140 Queen Street Boone NC: one block up from the Mast General Store in downtown Boone.

### **You will come to the windows with the VITA sign at the library.**

Only the certified VITA volunteers will handle your documents, and they will be returned to you when you sign the return.

- All tax related documents must be dropped off and left with the VITA volunteers for the duration of your appointment.
- We need you to complete an intake form and a consent form
- VITA volunteers will call you to discuss your taxes. Ability to receive phone call from VITA Volunteers is required.

### **When:**

From Feb 12 through April 10, 2021, with the exception of April 2<sup>nd</sup> and April 3<sup>rd</sup> (Easter Holiday)

Appointments available:

Fridays from 1 to 3 pm

Saturdays 10 am to 2 pm

Appointments generally take one hour.

### **How to Sign Up for Tax Assistance:**

- See the general eligibility requirements below
- Check the list of what to bring below

**Make an appointment: call 828 457 4303.**

## **General Eligibility Guidelines for VITA Tax Preparation**

1. Generally, your income must be \$57,000 or below for the 2020 tax year.
2. We can prepare your taxes if you are self-employed with \$10,000 or below in expenses.
3. We cannot prepare your taxes if you are a member of the military, clergy, a small business owner, or a farm owner.
4. In most cases, you do not qualify for V.I.T.A. if you earned income in a state other than N.C. in 2020.

Exceptions: If income was earned in Alaska, Florida, Nevada, South Dakota, Texas, Washington, Wyoming, New Hampshire or Tennessee, we can prepare your taxes if the above eligibility criteria are met (these states have no income tax).

### **What to Bring to your VITA Appointment:**

- For married filing jointly, bring your spouse: both spouses must be present to sign the return.
- Picture ID for yourself and/or your spouse
- Social Security cards for each person included on tax return OR Medicare cards OR Military ID cards
- Birth dates for you, spouse, and/or dependents included on the return

If you do not have a Social Security Number, an Individual Taxpayer Identification Number assignment letter may be substituted for you, your spouse and/ or your dependents. Please bring Taxpayer Identification notices/cards for you, your spouse, and/or dependents

- Proof of foreign status if applying for ITIN (Individual Taxpayer Identification Number)
- All Forms W-2s, 1099s and documents supporting income & expenses (total amount of itemized deductions)
- Affordable Health Care Act Statement if applicable (Forms 1095-A)
- Last year's tax returns
- If claiming child care expenses, bring the name, address, total paid to day care provider and their tax ID number
- For prior year returns, copies of income transcripts from IRS and state (if applicable)
- For Direct Deposit of refund, bring account and routing numbers