



“Coming Together For Stronger Communities” Volunteer Income Tax Assistance (VITA) and Tax Counseling for the Elderly (TCE)

FREE TAX PREP FOR YOU

VITA: The VITA program offers FREE tax preparation to low- to moderate-income taxpayers. IRS-certified volunteers help eligible taxpayers in local communities with the electronic filing of their tax returns.

TCE: The TCE program offers free tax help for everyone, with priority assistance given to taxpayers who are 60 years of age and older, specializing in questions about pensions and retirement issues unique to seniors.

SELF-HELP TAX PREP

In addition to traditional face-to-face tax preparation, the IRS offers a self-assistance service at many VITA/TCE locations. If individuals have a simple tax return and need a little help to prepare it or do not have access to a computer, they can visit one of the participating tax preparation sites and an IRS-certified volunteer will guide them through the process. You can also use www.MyFreeTaxes.com from the comfort of your own home if you have a computer available and your adjusted gross income is below the offer threshold for the current filing season. Please check the website for more details.

WHERE DO I GO TO GET MY TAX RETURN PREPARED?

FIND A VITA SITE NEAR YOU

There are thousands of VITA sites located across the country. You may find a site near you year-round, but most sites are open between January and April. To find a site near you, use the VITA Locator Tool on <https://irs.treasury.gov/freetaxprep/> or call 1-800-906-9887.

FIND AN AARP FOUNDATION TAX-AIDE TCE SITE NEAR YOU:

The AARP Foundation's Tax Aide Program operates most TCE sites. To locate the nearest AARP Tax-Aide site, use the AARP Site Locator Tool on www.aarp.org/applications/VMISLocator/searchTaxAideLocations.action or call 1-888-227-7669.

Note: Every taxpayer must use the correct Social Security Number (SSN) or Individual Taxpayer Identification Number (ITIN). If you do not have a SSN or ITIN for you or your dependent(s), complete Form SS-5, Social Security Number Application. Then submit Form SS-5 to the nearest Social Security Administration Office. For individuals that need to get an ITIN they must attach Form W-7 for each individual claimed with their completed return along with other required documents necessary for the Form W-7 to be validated.

POSITIVE ASPECTS OF THE VITA/TCE PROGRAM

1. Partners and volunteers will bring dollars and other valuable resources into their communities.
2. Volunteers will learn beneficial career building skills, business skills, and financial insights.
3. Partners and volunteers will provide taxpayers with free tax preparation and financial guidance to help increase their income, build savings, and gain and sustain assets.
4. Volunteers will receive free IRS specialized tax preparation training.
5. Volunteers and taxpayers will become familiar with valuable deductions, allowable expenses, and tax credits.
6. Volunteers with PTINs can earn CE credits for instructing certain courses, preparing taxes, and quality-reviewing tax returns.
7. Student volunteers can earn community services hours and possible credits.

Get Your Taxes
Prepared for Free!

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HOW CAN I BECOME A VOLUNTEER?

If you are interested in becoming a VITA/TCE volunteer please complete the [VITA/TCE Volunteer and Partner Sign Up](#) form.

Bring Money and Resources Into Your Community!

IRS RESOURCES & SUPPORT THROUGH PARTNERSHIPS

IRS-SPEC has cultivated a network of over 50 national partners, 2,400 local partners, and 87,000 volunteers that provide:

1. Outreach and marketing materials.
2. Technical and administrative training and tools.
3. Access to and support from local and national partners.

* If you join the team, we will connect you with other partners in your community and work with you to develop your program under our quality standards.

NOTE: [Publication 4396-A](#), Partner Resource Guide, is accessible on www.irs.gov in the Forms and Publications section and contains extensive information and guidance regarding the VITA/TCE program.

PARTNERSHIP INFORMATION

- Visit [this page](#) for more information
- For sites in your community, visit the [VITA locator](#)

To become a VITA/TCE partner and to have an IRS-SPEC relationship manager contact you, please complete the [VITA/TCE Volunteer and Partner Sign Up](#) form.

For more information about VITA/TCE programs and other IRS Information visit www.irs.gov

Thank you for allowing us to assist you in making an impact in your community!

WHAT DO I BRING?

If applicable please bring the following:

- Proof of identification – Picture ID
- Social Security cards for you, your spouse, and dependents; Or Individual Taxpayer Identification Number (ITIN) assignment letter(s).
- Wage and earning statement(s) Form W-2, W-2G, 1099-R, 1099-Misc from all employers.
- Interest and dividend statements from banks (Forms 1099).
- Information statements such as Form 1098, mortgage & interest paid to lenders.

Acquire Lifelong Career Building Skills!

- Form 1098-T, tuition statement.
- ID Theft – IRS Notice CP01-A provides the Identity Protection PIN issued every year in December.
- A copy of last year's federal and state returns if available.
- Proof of bank account and routing numbers for direct deposit.
- Total paid for daycare provider. The provider's tax identification number, Social Security Number, or the provider's business Employer Identification Number.
- To file taxes electronically on a married-filing-joint tax return, both spouses must be present to sign the required forms.