

Why pay for TAX PREP?

VITA Program sponsored by
the IRS and the United Way
Bay Area

If your annual household income is **\$54,000** or less, visit our **FREE TAX PREP** sites!!!

| LOCATION | DAY(S) & HOURS OF OPERATION | TYPE OF SERVICE |
|---|---|---|
| <u>Fremont Family Resource Center</u> 39155 Liberty Street Building EFGH Fremont, CA 94538 | January 24 to April 17, 2018 Wednesdays: 4:00 to 8:00 pm Thursdays: 4:00 to 8:00 pm Fridays: 10:00 am to 1:00 pm Tuesday, April 17, 2018 – 10 am to 7 pm | Walk-In, and Drop-Off (Basic returns only) <i>*Free on-site childcare provided on a first come basis; space is limited*</i> |
| <u>New Haven Adult School</u> 600 G Street (Entrance on H Street) Union City, CA 94587 | January 27 to April 14, 2018 Saturdays: 10:00 am to 1:30 pm <i>*Closed Saturday, March 10, 2018*</i> | Walk-In, Self-Prep (need 2016 AGI), and Drop-Off (Basic returns only) |
| <u>Ohlone College-Newark Campus</u> <u>Tri-Cities One-Stop Career Center</u> 39399 Cherry Street, Room 1211 Newark, CA 94560 | January 30 to April 17, 2018 Tuesdays: 11:00 am to 3:00 pm | By appointment only: Call - (510) 574-2026 |
| <u>Tri-City Volunteers</u> Please use Thrift Store entrance 37350 Joseph Street Fremont, CA 94536 | January 29 to April 16, 2018 Mondays: 10:00 am to 2:00 pm <i>*Closed Monday, February 19, 2018*</i> | Drop-Off (Basic returns only) |

**** Please note, if we reach capacity, we may have to close our doors early ****

SAVE FOR AN OPPORTUNITY TO WIN \$100 or \$10,000

Tax time is the perfect time for savings! Start now and save for an emergency or a financial goal (college education, dream home, vacation, retirement, etc.).

When you split your refund and save at least \$50, you'll be entered into local and national Save Your Refund raffles for weekly and monthly drawings of \$100. There's also an opportunity to enter a \$10,000 drawing!

VITA staff will help you save a portion of your refund & enroll in the raffle drawings!

For more information, call SparkPoint Fremont FRC at (510) 574-2020
or visit www.fremontvita.org

**Earn It!
Keep It!
Save It!**



SEE OTHER SIDE FOR A LIST OF
REQUIREMENTS & ADDITIONAL
INFORMATION



YOU NEED TO BRING

- For each person listed on the return:
 - Social Security card or Individual Taxpayer Identification Number (ITIN)** card or letter
 - MUST KNOW** Birthdates for everyone listed on tax return
- Photo identification** (for you and your spouse, if filing jointly)
- Routing and account number for savings and checking accounts or a voided check, and/or pre-paid debit card for direct deposit
- Copy of Previous Year's Return**
- Income statements or forms like the following:
 - Wages from each job (W-2)
 - Interest (1099-INT)
 - Dividends (1099-DIV)
 - Retirement Plans (1099-R)
 - Gambling Winnings (W-2G)
 - Unemployment (1099-G)
 - Social Security Benefits (SSA-1099)
 - Miscellaneous Income (1099-MISC)
 - Sale of Stock (Consolidated Form 1099-B)
 - Tuition (1098-T) and detailed student account statement of expenses paid to university/college
 - Health Insurance Information (1095-A, B, or C)

BRING IF IT APPLIES TO YOU:

- 2017 Identity Theft PIN Letter from IRS
- Records of charitable contributions
- Homeowner mortgage interest (1098)
- Property tax bill
- DMV registration form
- Interest you paid on student loans (1098-E)
- Day care expenses you paid for your children; bring provider's name, address, & tax ID or Social Security Number, and phone number
- Business incomes and expenses, including mileage log(s)

APPOINTMENTS NEEDED FOR THE FOLLOWING

- Foreign Student with Visa F,J,M or Q
- In need of ASL interpreter
- Foreclosure/short sale
- Loan Modification
- Insolvency
- Sale of principal residence
- 16+ Stock Transactions

**For an appointment call
Jane O'Hollaren at (510) 574-2026**

WHY WAIT? DROP-OFF YOUR TAXES!

Use our Drop-Off service if you have any of the following:

- Wages from job(s) (W-2)
- Interest (1099-INT)
- Dividends (1099-DIV)

AND, you had full year health coverage, not purchased through Covered California

WE WILL NOT PREPARE THE FOLLOWING TAX RETURNS:

- Self-employment & sole proprietor business with expenses over \$25,000, depreciation, losses, or office in the home
- Rental income with rental expenses
- IRA conversions
- Out of state income
- Married Filing Separately
- 1040NR (non-resident alien), with the exception of Foreign Student with Visa F, J, M or Q

****Other tax returns may be out-of-scope****



Our **IRS-CERTIFIED** tax preparers are **PASSIONATE** about taxes and will get you the **maximum refund** allowed by law.

*Providing **QUALITY** service since 2002*

Need fast access to your money without paying additional fees? Direct deposit your refund into your bank account for faster refund. No bank account? No worries, we can help you enroll for a free pre-paid debit card at our site.