

Southern WV Community & Technical College

VITA Free Tax Prep – 2023 Tax Year

Due to limited volunteer assistance, our appointments are limited. Therefore, we are pleased to offer **multiple service options** to our clients this year.



In-Person Tax Prep: Our most popular option. Taxpayers will bring their completed tax forms and information to a scheduled appointment on campus. A volunteer tax preparer will prepare your tax return and review it with you. Your return may be completed and filed in one visit.



Drop-Off Tax Prep: With drop-off service, you will schedule a short appointment (20 mins or less!) to drop off your tax documents and pre-filled forms to one of our tax volunteers. We will work on your tax return and you will be contacted to return to the site to review, sign, and complete your tax return.



Virtual Tax Prep: With our new virtual tax service, you will send your tax documents to us through our secure online Client Portal. A certified tax volunteer will review your documents and contact you with additional information to complete your return. You will be contacted to review, sign, and complete your return (virtually or in-person.)

Eligibility:

To be eligible for free tax preparation services through the VITA program, you must meet the following guidelines.

- Be a US Citizen, Green Card holder, or hold a valid ITIN
- Have gross income of \$60,000 or less, **or**
- Persons aged 60 and above, **or**
- Persons with disabilities

Our site will operate from **February 5 - April 3, 2024**
(Closed March 25-29 for Spring Break)

In-Person Tax Prep	Tuesdays 2:00pm - 6:00pm Wednesdays 11:00am - 3:00pm
Drop-Off Tax Prep	Tuesdays 9:00am - 1:00pm
Virtual Tax Prep	By Request (see below)

Drop-Off and In-Person tax appointments will be scheduled using our online booking system.



Virtual tax prep is available by request. Complete the online form (linked below) to request virtual preparation.



ALL CLIENTS MUST COMPLETE AN INTAKE FORM BEFORE TAX PREP.

This includes new and returning clients.

Please arrive 10 minutes before your scheduled appointment to complete the form on-site **OR** download the form below and bring it with you.



Appointment Link	https://tidycal.com/stephaniemounts
Virtual Prep Request Form	https://forms.office.com/r/awV5xUT8QA
VITA Intake Form	https://www.irs.gov/pub/irs-pdf/f13614c.pdf

WHAT TO BRING TO YOUR TAX APPOINTMENT

- **Original Social Security card** (or ITIN card/letter) for **ALL** individuals that will be on the tax return
- Government Photo ID
- Income documents
 - W-2 forms
 - 1099-NEC, 1099-K, 1099-MISC (self-employment)
 - Form SSA-1099 Social Security **and/or** 1099-R Retirement
- Itemize and/or Expense documents
 - Mortgage Interest/Property Tax Statement (Form 1098)
 - College Tuition Expense (Form 1098-T)
 - Student Loan Interest (Form 1098-E)
 - Job-related expense receipts (**only** if self-employed)
 - Childcare Expenses (EIN of childcare provider required)
- Bank routing and account numbers (for refund direct deposit)
- Prior year tax returns (if available)

OUT OF SCOPE FOR FREE TAX PREP

Due to IRS rules and regulations for the VITA program, we are unable to prepare tax returns through our **free program** for any of the following situations:

- Income from Rental property (including AirBnB)
- Form 1099-A
- Form 1099-C (other than credit card debt)
- Business (Schedule-C) that kept inventory at any time during the year
- Net loss from business
- Required to file Form 4562 (Depreciation and Amortization)
- Business expense deduction for Use of Home

Questions? Contact Stephanie Mounts at (304) 896-7630
or Stephanie.Mounts@southernwv.edu