

VITA (Volunteer Income Tax Assistance) services



Volunteer Income Tax Assistance (VITA) volunteers will assist low-to-moderate income taxpayers with basic tax returns February 1 through April 15, (no service Feb. 18 & 24) in the Bessmer Meeting Room. Hours will be

Mondays, 5:30-8 p.m.

Wednesdays and Thursdays, 2-5 p.m.

Saturdays, 9:30-noon

For joint returns, both spouses need to be present to sign or return will not be transmitted.

Volunteers are not trained to help people with the following types of income: rental property, farm income, royalties, sale of business property, moving expenses, employee business expenses, more than one 1099-MISC, self-employment expenses over \$5,000, military pay.

Those desiring tax assistance will be served in order of sign-up. Sign up sheet will be put out at 9:00 a.m. each tax assistance day for sign up for that day only. Each individual must be present to sign up. Individuals must be at the east table in the Adult Department one-half hour before the tax session for that day to hold their place in the queue.

Intake monitor will begin calling names at the following times:

Mondays, 5:00 p.m.

Wednesdays and Thursdays: 1:30 p.m.

Saturdays: 9:00 a.m.

Adjusting to the number of VITA volunteers available makes it necessary to limit the number of taxpayers assisted each session. Those at the lower end of the list are not promised assistance.

Those seeking assistance should bring:

- This year's tax package you received in the mail and a copy of last year's tax return
- Photo identification and social security card or ITIN cards for every person listed on the return
- Birth dates for primary, secondary and dependents on the tax return
- Wage and earning statement(s) Form W-2, W-2G, 1099-R from all employers in 2009
- Any forms received such as employment (1099-G), tuition statements, etc.
- Bank routing numbers and account numbers for direct deposit
- Total paid for day care and day care provider's identifying number
- Real estate tax statements; personal property tax statements
- If you itemize deductions: lists, receipts, bills or statements for your medical expenses, taxes, home mortgage interest, contributions and miscellaneous expenses, closing papers (1st time home buyers)
- For Homestead Refund owners/renters should bring real estate tax receipts and contact information for landlords.

Returns are E-filed. Returns are not kept on file at the Library. Retain your own copy.

Volunteers are graciously donating their time during the tax season.