

Extended Services 2023

Facts

- ✓ Volunteer Income Tax Assistance (VITA) is a federal program created 52 years ago
- ✓ This service is provided by trained **certified tax professionals** who will – in addition to preparing taxes for free – also determine an individual’s eligibility for special tax credits. Such as EITC, CTC, Education Credits, etc.
- ✓ **EITC (Earned Income Tax Credit):** The federal EITC for low-to-moderate-income working people reduces the amount of taxes owed and refunds the difference if the credit is larger than the amount owed. The credit changes from year to year and is based on earnings, number of qualifying children and marital status. **All eligible taxpayers must be US citizens or legal permanent residents.**
- ✓ For more information about the services, taxpayers are encouraged to:
 - **call 2-1-1 of Broward***
 - **call the VITA Hotline @ 954-964-8884** (select your language of preference, then select extension 3)
 - **log onto www.vitaxesfree.org**
 - **visit the nearest VITA site during operating hours**
- ✓ 2-1-1 provides assistance in multiple languages, including English, Spanish, French, Haitian-Creole, Portuguese and American sign-language

Who qualifies for the FREE tax preparation services?

- ✓ Working individuals and families with or without dependents (children or adults) who made **\$66,000 or less in 2022**. However, we’ll assist taxpayers with greater annual household incomes if we determine that the tax return is within scope and the site coordinator determines if we help the taxpayer.
- ✓ People with disabilities, veterans, seniors and taxpayers whose primary language is not English who need assistance in preparing their federal income tax returns can have their taxes prepared for FREE.

What services are offered?

- ✓ Free tax preparation services: We assist with filing **2022 federal income tax returns**.
- ✓ We can also help prepare or amend **2019, 2020, and 2021 federal income tax returns**.
- ✓ **Electronic filing (e-file)** is offered for FREE and is the safest and quickest way to file your taxes. **For those who have been victims of Identity theft, you must bring their identity theft PIN letter that the IRS sends every year. Otherwise, we cannot e-file your tax return. We can prepare a paper return that you must mail to the IRS.**



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- ✓ VITA services will be provided at **2 or 3 locations** in Broward County during the extended services period (June to October). Some sites are appointment-only while others accept walk-ins.
- ✓ VITA extended services sites start opening as early as June 3.
- ✓ Call 2-1-1, 954-964-8884 for locations and schedules, go to www.vitaxesfree.org, search for VITA site locations on www.irs.gov or contact the partner sites for more information.

However, we cannot file your tax return if:

- Your tax return, regardless of income, is **out of scope** for VITA and our volunteers and staff are not certified to help you with your tax situation.
- Your household's adjusted gross income (AGI) is more than \$66,000
- You or your spouse are a dual-status or non-resident alien
- You or your spouse receive income from farm or rental properties
- You or your spouse are a member of the clergy
- You or your spouse have to make any of the following payments:
 - Penalty for underpayment of estimated tax
 - Alternative minimum tax
 - Household employment tax
- You don't provide all the required documents when you visit a VITA site

What to Bring:

Please note that this is not a comprehensive list. Other documents may be required based on the information shared during the intake and interview process at the sites.

- **If you were a victim of Identity Theft, you must bring your Identity Theft letter from the IRS with your newly-issued PIN #.** The PIN # changes every year. You must bring the newest letter that the IRS mailed for this tax season.
- Must have current **Government Issued ID with the correct information**
- **Social Security** card or verification letter that includes the Social Security Number, or **Individual Taxpayer Identification Number (ITIN)** letter for all members to be included in the tax return
- **W-2 forms for all jobs worked** (2022, 2021, 2010, 2019) as applicable to the tax year you need to file
- **Form 1099-G** for unemployment compensation and state or local tax refunds
- **Form 1099-R** or form **SSA-1099**
- If you are self-employed
 - Bring all the supporting documentation related to your business income and expenses. (If you worked with Uber and/or Lyft, you must bring the official statement they provide showing the details of gross payments received, mileage and fees paid during 2022).

- You must bring your Form **1099-NEC**, **1099-K** as it may show important information related to your business.
- **Form W-2G** and any other 1099 form received during 2022
- Childcare provider name, address, and tax ID number (may be the care provider's SSN/ITIN), and the amount paid in 2022
- **Form 1098-T**, updated unofficial transcripts from your school, and school statement showing charges and payments for every academic period, if you or anyone in your household attend college or university (post-secondary education)
- Other applicable tax-related documents, such as interest statements, federal loan documents, retirement statements, list of organizations to which you made charitable donations and their support documentation, etc.
- **Forms 1095-A, B or C**, Affordable Health Care Statements
- **Form 1099-K**- for those self-employed taxpayers who use debit, credit, other 3rd party (e.g. cash app, venmo, zelle) for business transactions or settled with a third party network for transactions with gross payments that exceeding \$600 in 2022.
- **Direct Deposit info**: Banking or credit union account information (routing and checking/saving account number) if you would like direct deposit of your refunds
- Bring your prior year's tax return depending on which tax return you need help preparing or amending:
 - For help preparing your **2022 tax return**, bring your **2021 tax return**.
 - For help preparing your **2021 tax return**, bring your **2020 tax return**.
 - For help preparing your **2020 tax return**, bring your **2019 tax return**.
 - For help preparing your **2019 tax return**, bring your **2018 tax return**.

Important documents to bring if you need help with filing your 2021 tax return:

- **IRS Letter 6419** 2021 Advance CTC If you receive ADVANCE CHILD TAX CREDIT,
- **IRS Letter 6475** if you receive the Third Economic Impact Payment of \$ 1,400.00 or your bank statement showing the deposit of it.

If filing a married filing joint return,

- Both spouses must be present during the time of the visit.



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Important information for Florida Storm Victims (affects Individual and Small Business tax returns):

- The IRS automatically extended **the deadline to file and pay 2022 income taxes to August 15, 2023.**
- You also have until **August 15** to make **estimated quarterly tax payments** which were normally due on April 18.
- You also have until August 15 to make **2022 contributions to your IRA and health savings account.**
- You may choose to claim casualty losses on your 2022 tax return or your 2023 tax return (the year that the disaster related loss occurred).
- You may contact Broward Tax Pro for help if **you still received a late filing and/or late payment penalty from the IRS during the time** when the deadline should have been extended.
- Eligible taxpayers who need more time may **file for an extension by August 15.** Filing an extension will give you until **October 16 to file your 2022 tax return, but taxpayers must still pay their taxes owed by August 15.**