



# IRS Certified Volunteers Providing **FREE TAX PREPARATION**

**Drive-thru  
tax return preparation  
drop-off/pickup service**



***No Appointment Needed***

**Philadelphia SDA Church**

629 Cameron St.  
Burlington, NC 27215

**at**

**Sundays**

**February 14 - May 2, 2021**

**12:00pm - 2:00pm**

**Questions? Call (336)210-5206**

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Due to COVID-19 concerns, for your safety and the safety of our volunteers, we will provide **drive thru drop off/pickup service ONLY**.

**Stay in your car.**

1. We will bring a tax preparation kit out to you. It details the information we will need from you to complete your tax return.
2. You can either take the kit home to fill out the forms or you can leave your tax information with us if you have everything with you.
3. We will make an appointment to conduct an interview with you via telephone or ZOOM videoconference.
4. We will prepare your tax return.
5. We will review the results with you by telephone or ZOOM.
6. You come back to our location the following Sunday to sign your return and get your copy to keep. Your documents will be returned to you.
7. We will e-file your return the same day that you sign it.

The IRS Volunteer Income Tax Assistance (VITA) program offers *free* tax help to people who generally make less than \$57,000, persons with disabilities, and limited English speaking taxpayers who need help with preparing their tax returns. IRS-certified volunteers provide free basic income tax return preparation with electronic filing to individuals who qualify. ***\*\*Please see a professional preparer for assistance with complicated returns.***

## What You Need to Bring

- ◇ For married filing joint, both spouses must be present
- ◇ All Forms W-2 and 1099
- ◇ Information for other income
- ◇ Information for all deductions (*including charitable contributions*)/credits
- ◇ A copy of last year's tax return
- ◇ For direct deposit of refund, proof of account and bank's routing number
- ◇ Social Security cards or Individual Taxpayer Identification documents for you, your spouse, and/or dependents
- ◇ Government issued photo identification for you and your spouse (if married)
- ◇ Total paid to day care provider and their tax ID number
- ◇ Birth dates for you, spouse and/or dependents
- ◇ Forms 1095-A, B or C (ACA Statements)
- ◇ Notice 1444, Economic Impact Payment 2020, if applicable

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## We Will Prepare

- ◇ Wages, salaries, etc. (Form W-2)
- ◇ Interest Income (Form 1099-INT)
- ◇ Dividends Received (Form 1099-DIV)
- ◇ State Tax Refunds (Form 1099-G)
- ◇ Unemployment Benefits (Form 1099-G)
- ◇ IRA Distributions (Form 1099-R)
- ◇ Pension Income (Forms 1099-R, RRB-1099, CSA-1099)
- ◇ Social Security Benefits (Form SSA-1099)
- ◇ Simple Capital Gain/Loss (Form 1099-B) *limited*
- ◇ Sale of Home (Form 1099-S), *limited*
- ◇ Self-employed Income (Form 1099-MISC, Form 1099-NEC), *limited*
- ◇ Gambling Winnings (Form W-2G)
- ◇ Cancellation of Debt (Form 1099-C), *limited*
- ◇ Health Savings Accounts (Form 1099-SA), *limited*
- ◇ Itemized Deductions, *limited*
- ◇ Education Credits (Form 1098-T)
- ◇ Child Tax Credit
- ◇ Earned Income Credit
- ◇ Health Insurance Statements (Forms 1095-A, B or C)

- ◇ Credits for Sick Leave and Family Leave for Certain Self-Employed Individuals (Form 7202)
- ◇ Economic Impact Payment (Recovery Rebate Credit)
- ◇ Prior Year and Amended Returns, *limited*



## We Will Not Prepare

- ◇ Schedule C with losses
- ◇ Complicated Schedule D (capital gains and losses)
- ◇ Form SS-5 (request for Social Security Number)
- ◇ Form 8606 (non-deductible IRA)
- ◇ Form 8814 (child taxed at parent's tax rate)
- ◇ Form SS-8 (determination of worker status for purposes of federal employment taxes and income tax withholding)
- ◇ Parts 4 & 5 of Form 8962 (Allocation of Policy Amounts, Alternative Calculation for Year of Marriage)
- ◇ Form W-7 (application for Individual Taxpayer Identification Number (ITIN))