



IRS Certified Volunteers Providing

FREE TAX PREPARATION

IRS VITA/TCE return preparation sites are operated by certified volunteers. Site operating hours and services offered may be limited. In addition, by law, some sites provide priority services to seniors. Please be advised that you may not be immediately served. Your patience and understanding are appreciated.

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-R, CSA-1099)
- Social Security Benefits (Form SSA-1099, RRB-1099)
- Simple Capital Gain/Loss (Form 1099-B) *limited*
- Sale of Home (Form 1099-S) *limited*
- Self-employed Income (Form 1099-MISC) *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)
- Prior Year and Amended Returns *limited*
- Form 8615 (tax on certain children's unearned income) *limited*
- Recovery Rebate Credit (Economic Impact Payment)
- Credit for Sick and Family Leave

Will Not Prepare

- Schedule C **with loss**
- 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)



Please see a professional preparer for assistance with complicated returns.

What to Bring

- For married filing joint, both spouses must be present
- Photo identification for you and your spouse (if filing joint return)
- Social Security cards or Individual Taxpayer Identification Number documents for you, your spouse, and dependents
- Birth dates for you, spouse and dependents
- A copy of last year's tax return
- All Forms W-2, 1098, and 1099
- Form 1095-A (Marketplace Health Insurance)
- Information for other income
- Information for all deductions/credits
- Total paid to day care provider and their tax ID number
- For direct deposit of refund, proof of account number
- For prior year returns, copies of income transcripts from IRS (if Form W-2 not available)



Site Name: Hartwick College VITA site
Location: Zoom
Days: 2/16, 2/23, 3/2, 3/2, 3/9, 3/16, 3/23, 3/30, 4/6, 4/13
Hours: 6-9PM

To schedule your appointment,
Please email to
vita@hartwick.edu



IRS e-file is fast, more accurate, secure, and simple.