

Directions for Preparing the *Packet* for 2024 tax returns

We can prepare and efile: prior year tax returns, self-employed, independent contractor returns, Schedules A,B, C and D, Earned Income Tax Credit, Education Credit, Child Care Credit, ITIN returns, returns for ITIN applications and ITIN information.

We cannot prepare: Rentals (Schedule E), 1040 non-resident returns (in the US less than 183 days), returns for LLC's, bitcoin/virtual currency sales, NY, CA, CT or complex state returns, healthcare with "shared policy allocation", depreciation, very complex returns or unusual investment returns.

Income limit guidelines (Number in Household)/income: (1) \$77,800, (2) \$88,900, (3) \$100,000, (4) \$111,300 (5) \$119,900.

1. Items to **bring/ include in packet:**

- **Photo ID:** driver's license or passport, self and spouse
- **Social security card or ITIN letters** for self, spouse, dependents (or, copy of last year's tax return *if* all persons same as 2023 and if don't have original documents)
- **Identity Protection PIN (IP PIN)** if one has been assigned to you, your spouse, or dependents
- **Bank Account information** (if you want to receive direct deposit of refund or make direct withdrawal payment of taxes)
- Bring voided check, or written Bank Name, Routing number, Account number
- Bank Account must be in taxpayer or spouse's name!
- **2023 tax return** (optional, but very helpful!)

2. **Review and complete/sign 14446 Virtual VITA/TCE Taxpayer Consent** (form in the *packet*).

3. **Complete the yellow form 13614-C Intake/Interview** (form in the *packet*). Be sure to complete/sign the back page 15080 Consent.

- As you fill out the form 13614-C Intake/Interview, **collect/bring any of the following documents** that apply to you. (If you aren't sure if it's needed, bring it anyway.) Common forms are: W-2s, all 1099s, 1098-T or E, 1095-A (healthcare), 5498-SA, 1099-SA (for a HSA), some expenses for daycare and/or education (teachers) may be tax deductible (there are limits). **For self-employed, bring record of business expenses, including business miles and income (1099-NEC)**

Most people will not have enough deductions to itemize expenses (Schedule A) that begin at \$14,600. If you have a mortgage or very high medical expenses, you may be able to itemize. If so, bring documentation for property taxes, form 1098 Mortgage interest, medical expenses (limited to amount over 7.5% of AGI), charitable donations and home sale/purchase documents.

Bring any other documents pertinent to your tax return, including any received in an **envelope marked "important tax document enclosed"**

4. **Review/Sign Appointment**

VITA volunteers will contact you (via text) when your taxes are reviewed and completed.

Make your review/sign appointment (SignUpGenius) <https://wyomingfreetaxservice.org/jackson>

Come to your appointment at the Senior Center.

Review and sign your return. Receive a printed copy of your return.

5. **VITA Efiles your tax return, usually within 24 hours.**

All information that you provide will be handled/controlled/secured per IRS Privacy, Confidentiality and Civil Rights (pub 4299) protection requirements.