

Directions for Preparing the *Packet* for 2025 tax returns

We can prepare and e-file: 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 income.

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

1. Make an **Intake** appointment at the Senior Center (SignUpGenius) <https://wyomingfreetaxservice.org/jackson>
2. Items to **bring**:
 - o **Photo ID:** driver's license or passport, self and spouse
 - o **Social security card or ITIN letters** for self, spouse, dependents (or a copy of last year's tax return *if* all persons same as 2024 and you don't have original documents)
 - o **Identity Protection PIN (IP PIN)** if one has been assigned to you, your spouse, or dependents
 - o **Bank Account information** (if you want to receive direct deposit of refund or make direct withdrawal payment of taxes) *As of 9/2025, IRS is no longer issuing or accepting paper checks.*
 - o **2024 tax return** (optional, but very helpful!)
3. **Review and complete/sign 14446 Virtual VITA/TCE Taxpayer Consent** (form in the *packet*).
4. **Complete the form 13614-C Intake/Interview** (form in the *packet*). Review back page 15080 Consent, agree (sign) or dissent (no signature).
5. As you fill out the form 13614-C Intake/Interview, **bring all of the following documents that apply to you:** (If you aren't sure, bring it anyway) W-2s, **all** 1099s, 1098s (including -T, -E), 1095-A (Marketplace healthcare), 5498-SA, 1099-SA (for an 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). If you receive TIPS or OVERTIME, we need employer documentation supporting such compensation.**

Most people will not have enough deductions to itemize expenses (Schedule A) that begin at **\$15,750**. If you have a mortgage, property tax, or very high medical expenses, you may be able to benefit. 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"**

6. **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 and your original tax documents.
7. **VITA E-files 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.