

Everyone who is required to file taxes **must report** all required information in order to file an accurate tax return, and receive the credits and refund they are eligible.

Common tax documents are listed in this checklist. For a more complete list visit our website

www.washtenaw.org/freetaxhelp

If you are uncertain about which documents you need, contact our

VITA Line 734-677-7235

All clients must bring:

- Driver's License or Photo ID** for each adult on the tax return
- SSNs or ITINs** for each family member
- Bank account information, **IF** client would like to receive or pay any tax refund or liability directly through that account.

Common Tax Documents Checklist:

- Salary or wages, W-2
- Retirement Income, 1099-R
- Social Security, SSA- 1099
- Self-employment and tips
- Other Income, 1099-MISC
- Unemployment, 1099-G
- Alimony or child support
- Marketplace health insurance, 1095-A
- Healthcare savings account, 5498-SA or 1099-SA
- Student loan interest, 1098-E
- tuition, scholarships, and educational expenses, 1098-T
- Proof of child and dependent care expenses
- Supplemental Security Income letter
- Interest, dividends, and sales of bonds, 1099-INT, 1099-DIV, 1099-B
- Healthcare premiums
- Vehicule Insurance Premiums
- Michigan 2020 rent paid, or property taxes paid, Heating costs and provider
- Teacher supply expenses

Volunteer Income Tax Assistance

2021 Tax Season



**United Way
of Washtenaw County**

What is **VITA**?

The Volunteer Income Tax Assistance (VITA) program is an IRS-sponsored national program that pairs certified volunteers with taxpayers to file tax returns.

Are you eligible?

You qualify for VITA services if:

- had an income of **\$57,000 or less** during 2020,

AND

Do not have:

- **Business expenses over \$35,000**, Schedule C
- **Rental, royalty, trusts, estates, etc. income**, Schedule E
- **Gain or losses from farming**, Schedule F
- **Most debt cancelation**

Virtual VITA Services

All VITA appointments will be scheduled virtually through UWWC site for all sites. Participants can use the following methods:

- Upload all required documents through our secure form
- Expect a call from a certified tax preparer and let us do the work!
- You will later review and sign your tax return

Scan & Go Services

Those with digital barriers can access our Scan & Go services thanks to partner local nonprofits.

- Schedule a drop off appointment for a Scan & GO site and bring all required documents
- Expect a call from a certified tax preparer and let us do the work!
- You will later review and sign your tax return at the same Scan & Go site

Schedule your free tax appointment today

Call 734-971-8200

or schedule online at

uwashtenaw.org/freetaxhelp

Call our VITA Line with any questions

734-677-7235

Other filing resources can also be found in our website