



Serving Danbury, CT and the surrounding area, Danbury-VITA, Inc. offers free preparation and e-filing of Federal and state income tax returns to persons of moderate income (\$60,000 or less). Danbury-VITA operates under the auspices of the Volunteer Income Tax Assistance (VITA) program of the auspices of the Internal Revenue Service. All returns are prepared, quality-reviewed and e-filed by IRS-certified, unpaid volunteers.

We offer the two convenient locations, and the dates and hours of operation listed below. Appointments are strongly encouraged but walk-ins are accepted.

Location	152 Deer Hill Avenue, Suite 105 Danbury, CT  <b>(Park off-site unless you are handicapped!)</b>	New Milford Public Library 24 Main Street New Milford, CT
Dates/Times	Jan. 24, 2018 to April 14, 2018 Mondays 5-9 PM Tuesdays CLOSED Wednesdays 2-6 PM Thursdays 2-9 PM Fridays CLOSED Saturdays 9 AM -1 PM Sundays CLOSED  <b>Closed</b> Presidents weekend (2/17 and 2/19), Good Friday (3/30) and 3/31	Jan. 26, 2018 to April 6, 2018 Fridays 10 AM – 2 PM  <b>Closed</b> 3/30.

Please call if weather is inclement to confirm that we are open.

To make an appointment, please call 203-826-9517 or email us at [scheduler@danbury-vita.org](mailto:scheduler@danbury-vita.org).

If you are married and plan to file jointly then you and your spouse or partner must both be present when your return is prepared. Please bear this in mind when making an appointment.

Because we are a free, non-profit service, we will not prepare your return if:

- Your income is greater than \$60,000,
- You are self-employed (need to file Schedule C) and we, in our sole discretion, deem your situation too complex, or
- You have income from rental of real estate.

## PREPARATION AND DOCUMENTATION

To enable us to prepare an accurate tax return, and to avoid the need for rescheduling, please bring with you each item of documentation listed below, if applicable. Please discard envelopes, review all documents for obvious errors and arrange the documents in the order listed.

### IDENTITY VERIFICATION

Photo ID.

Social Security card or Individual Taxpayer Identification Number for everyone on tax return.

### INCOME TAX RETURN FROM PRIOR YEAR

Please bring in copies of your prior year Federal and state income tax returns.

### INCOME

W-2 ()

1099-INT (Issued for interest of \$10 or more) (We don't need bank statements)

1099-DIV (Dividends and Capital Gains) (These are sometimes mailed in March)

Social Security (SSA-1099)

1099-R (retirement distribution/pension)

1099-G (unemployment),

1099-C (cancellation of debt)

W-2G (gambling winnings)

1099-MISC (self-employment or other income)

Cash income

We do Schedule C on a very limited basis. A separate form is required. Please call to verify we can do your return before coming so you aren't disappointed. **ALL INCOME MUST BE REPORTED.**

### EXPENSES

Personal property (car) taxes paid to CT in 2017 (interest/late fees not included)

- Mortgage interest (1098)
- Real estate taxes
- Educational expenses (MUST have 1098-T)
- Cash Charitable contributions ((Acknowledgement letters)
- Non-Cash Charitable contributions (Donation slips – date/ purchase value/thrift shop value)
- Child/Dependent Care (need address and SS# or EIN for provider)
- Unreimbursed employee expenses
- Medical expenses (summarized/documentation) (mileage can be included)
- Energy-efficient home improvements (receipts)

HEALTH INSURANCE

Form 1095-A (If insurance purchased from the market place)

IF APPLICABLE: bring Form 1095-B/ Form 1095-C. HSA Distribution form.

DIRECT DEPOSIT information for Refund (if applicable).

**ALL RETURNS ARE E-FILED UNLESS PAPER-FILING IS REQUIRED BY THE IRS.**

Married Filing Jointly requires both spouses present to sign e-File form.