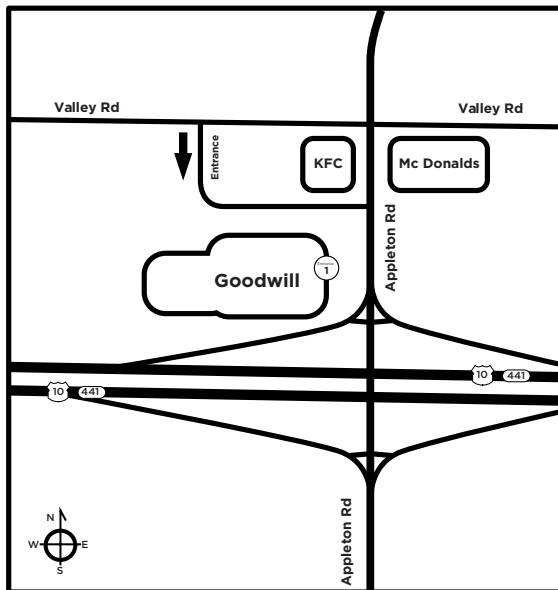


Who: The Volunteer Income Tax Assistance (VITA) program offers free tax assistance, preparation, and electronic filing services for people with low-to-moderate incomes (generally less than \$66,000) and people with disabilities. VITA is a program of Goodwill Industries of North Central Wisconsin (NCW).

When: January 28 - April 15, 2023
Valet VITA In-Person Service - By Appointment Only - No Walk-ins:
 Mon. - Thurs.: 12:30-5:30pm
 Saturday: 8am-12:00pm
 Meet with an Intake Specialist and let our volunteers prepare your return. Pick up your return when it's ready (typically 5-7 business days). Schedule your appointment at www.filetaxes4free.org. Call 920-968-6044 if you need assistance.

Where: **Goodwill Menasha Retail Store and Training Center-VITA Room**
 1800 Appleton Road, Menasha, WI 54952
 Entrance #1 (Retail Store)



What to Bring

- Photo ID for yourself and your spouse
- Social Security cards or ITIN letters for you, your spouse and dependents you will be claiming
- Birthdates for you, your spouse and dependents
- Copy of 2020 and 2021 Federal/WI tax returns
- Your spouse, if you are filing a married filing as a joint return. Both spouses must be present to sign the required forms
- For direct deposit, proof of account and bank's routing number

All information statements, including but not limited to:

- Wage statements from all employers (W-2) for you and your spouse (if filing jointly)
- Interest and dividend statements (1099-INT and 1099-DIV)
- Unemployment income (1099-G)
- State tax refund if itemized last year (your return included a Schedule A) (1099-G)
- Gain/loss from sale of stocks and any carry forward gain/loss (1098-B and/or Broker's statements)
- Pension, Annuity or IRA Distributions (1099-R)
- Social Security statements (SSA-1099)
- Railroad Retirement Benefits (RRB-1099)
- Tuition Payment statements (1098-T)
- Property tax receipt(s) for any property taxes paid in 2022 and 2022 property tax bill
- Health Savings Accounts (5498-SA,1099-A).
- Student Loan interest (1098-E)

Information regarding any other sources of income, both taxable and nontaxable, but not limited to:

- Alimony received and date of divorce agreement
- Self-employment income from own business or odd jobs and expenses (1099-MISC)
- Gambling and prize winnings (1099-MISC or W-2G)
- Scholarship income
- Tip income
- Disability income (Workers Compensation or Insurance)

Information regarding all other deductions/credits, but not limited to:

- Child/Dependent expenses and provider info (EIN/ Social Security number, address)
- Medical or dental expenses you paid during 2022 that were not reimbursed by your health insurance. This includes premiums for medical/dental insurance you paid
- Health Insurance Marketplace statement (1095-A)
- Health Insurance Coverage (1095-B, 1095-C)
- Mortgage interest paid (1098)
- Charitable contributions
- Education expenses (1098-E/1098-T and receipts/statement of account for tuition, books, supplies and equipment required for enrollment or attendance) and scholarships/grants received. Bring both your 2021 and 2022 1098-T
- IRA contributions
- Rent payments made in 2022
- Alimony paid, recipient's Social Security number and date of divorce agreement
- If you received a First Time Home Buyer Credit in a previous year, bring information on the purchase date and the amount of the credit you received
- Gambling losses (up to the amount of winnings received) if itemizing on Schedule A
- Estimated Federal and State withholding tax payments made

For Homestead Credit including, but not limited to:

- Original and unaltered rent certificate and/or a copy of 2022 Property Tax bill
- Printout of any Wisconsin Works (W2) payments received in 2022
- County Relief, Kinship Care or other cash public assistance
- Amount of SSA, SSI, SSI-E, and Caretaker Supplement payments
- Child support, maintenance and other support
- If under age 62 and you have no W-2 or self-employment income, bring proof of disability statement from either physician, Veteran's or Social Security Administrations

Self Prep:

Taxpayers can self-prepare/e-file using free software at www.filetaxes4free.org.

We can prepare:

- 1040 and Schedules 1-3
- Schedule A (Itemized Deductions)
- Schedule B (Interest and Dividends)
- Schedule C-EZ (Self-Employment)
- Schedule EIC (Earned Income Credit)
- Schedule R (Disabled/Elderly Credit)
- 2441 (Child and Dependent Care Credit)
- 8812 (Credits for Qualifying Children and Other Dependents)
- 8863 (Education Credits)
- 8962 (Premium Tax Credit)
- WI Form 1
- WI Homestead Credit

We cannot prepare:

- Adjusted Gross Income (AGI) > \$66,000
- Married filing separately (unless qualify for Head of Household)
- Divorced in 2022
- Military-Active Duty wages
- Schedule C
- Complicated and Advanced Schedule D
- Schedule E (Rental Income, Partnerships, S-Corps)
- Schedule F (Farm Income/Loss)
- 2106 (Employee Business Expenses)
- 3903 (Moving Expenses)
- 4684 (Casualty Losses)
- 8606 (Non-Deductible IRAs)
- 8615 (Kiddie Tax)
- 1099-A (Acquisition or Abandonment of Secured Property)
- 1099-C (Cancellation of Debt) other than credit card
- Parts 4 & 5 of 8962 (Premium Tax Credits)
- WI NPR (Non-Resident and Part-Year Resident)
- Out-of-state returns

Goodwill Industries of North Central Wisconsin (NCW) is one of 160 regional Goodwill organizations throughout North America and across the world. A member of Goodwill Industries International and Rehabilitation For Wisconsin, it has been serving north central Wisconsin communities since 1971.

Goodwill NCW is a not-for-profit, 501(c)(3) human services organization. It covers 35 counties and includes 27 retail stores and training centers from Manitowoc to La Crosse, and as far north as Rice Lake and Rhinelander. It is based at the Goodwill Menasha Retail Store and Training Center VITA Room.

Goodwill NCW provides job training and opportunities across our 35 counties through programs such as:

- **Financial and Debt Solutions Services**, which provides financial education, budget counseling and debt management programs.
- **Employment and Training Program**, which helps people with disabilities in obtaining and maintaining employment in the community.
- **GoodNeighbor**, which is a referral program that partners with local social service agencies to distribute Goodwill certificates so people can shop for emergency clothing and household items in their time of need.

Goodwill NCW is pleased to sponsor the VITA program again this year as part of our mission of Elevating People by Eliminating Barriers to Employment.

Taxpayers with a disability may request a reasonable accommodation and taxpayers with limited English proficiency may request language assistance to access service.



1800 Appleton Road • Menasha, WI 54952
920-968-6044
www.filetaxes4free.org
Equal Opportunity Provider



**VOLUNTEER INCOME
TAX ASSISTANCE** | VITA

Free Income Tax Assistance

(by appointment only - no walk-ins)



January 28 - April 15, 2023

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Training Center-VITA Room**

**1800 Appleton Road
Menasha, WI 54952
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