FREE Tax Help!

UNI VITA 2024 Free Tax Preparation and E-Filing *(2023 Tax year)*

When: **Wednesdays ONLY**
Dates: February 14 - April 3 (Excluding March 13)
International Returns begin March 20

Location: University of Northern Iowa
Curris Business Building, **Room 223**

Time: Wednesdays 6:00 - 8:00 p.m.
(Room opens 5:30 PM, for **walk-ins** until 7:30 pm, or earlier if crowded)
Drop-off option available
No Appointments available

UNI Free Tax Preparation Will NOT prepare returns:

- When Income is greater than ***$64,000***
- Self-employment (complex)
- Out-of-state income
- Sale of business property
- Rental Income & Farm Income
- Prior Year Tax Returns
- Foreign Tax Credits
- Married Filing Separate Returns
- Military
- Complex Returns

NOTE: ONLY Federal and IOWA returns will be prepared

NOTE: For married filing joint returns both spouses must be present

Questions: UNI Department of Accounting 273-2394

Prior Year Tax Returns - copy of last year's **Federal** and **Iowa** tax returns

Form W-2 - Wage and Tax Statement (Acquire one from each employer)

Forms 1099 - Interest, dividends, and any other miscellaneous income

Form 1098T - Tuition payment statement (also bring institution billing statement)

Form 1098E - Student loan interest statement

Form 1095-A (from the Health Insurance Marketplace)

Banking Information - Account and routing numbers for checking and/or savings account (for direct deposit or direct debit)

List of Additional Income Information - Income from disability, interest, state tax refund, alimony, tip, pension, IRA, unemployment, social security, self-employment, gambling, awards, and other sources of income

List of Additional Expense Information - Expenses from IRA, other retirement accounts, alimony paid (needs social security number of recipient), education, un-reimbursed medical, home mortgage payments, charitable contributions, real estate taxes, and any other sources of expenses

For more details on what VITA "Will Prepare, Will Not Prepare, & What to Bring," please see Publication 3676-B, next page.

IRS Certified Volunteers Providing

FREE TAX PREPARATION

IRS VITA/TCE return preparation sites are operated by certified volunteers. Site operating hours and services offered may be limited. In addition, by law, some sites provide priority services to seniors. Please be advised that you may not be immediately served. Your patience and understanding are appreciated.

Will Prepare

- Wages, salaries, etc. (Form W-2)
- Interest Income (Form 1099-INT)
- Dividends Received (Form 1099-DIV)
- State Tax Refunds (Form 1099-G)
- Unemployment Benefits (Form 1099-G)
- IRA Distributions (Form 1099-R)
- Pension Income (Forms 1099-R, RRB-1099-R, CSA-1099)
- Social Security Benefits (Form SSA-1099, RRB-1099)
- Simple Capital Gain/Loss (Form 1099-B) *limited*
- Sale of Home (Form 1099-S) *limited*
- Prior Year and Amended Returns
- Self-Employed Income (Form 1099-MISC, Form 1099-NEC and Form 1099-K) *limited*
- Gambling Winnings (Form W-2G)
- Cancellation of Debt (Form 1099-C) *limited*
- Health Savings Accounts (Form 1099-SA) *limited*
- Itemized Deductions *limited*
- Education Credits (Form 1098-T)
- Child Tax Credit
- Earned Income Credit
- Health Insurance Statements (Forms 1095-A, B or C)

Will Not Prepare

- Schedule C with loss, depreciation or business use of home
- Complicated Schedule D (capital gains and losses)
- Form SS-5 (request for Social Security Number)
- Form 8606 (non-deductible IRA)
- Form 8814 (child taxed at parent's tax rate)
- Form SS-8 (determination of worker status for purposes of federal employment taxes and income tax withholding)
- Parts 4 & 5 of Form 8962 (Allocation of Policy Amounts, Alternative Calculation for Year of Marriage)
- Form W-7 (application for Individual Taxpayer Identification Number (ITIN))
- Returns with casualty/disaster losses

Please see a professional preparer for assistance with complicated returns.

What to Bring

- For married filing joint, both spouses must be present
- Government issued photo identification for you and your spouse (if married)
- Social Security cards or Individual Taxpayer Identification Number documents for you, your spouse, and/or dependents
- Birth dates for you, spouse, and/or dependents
- A copy of last year's tax return
- All Forms W-2 and 1099
- Forms 1095-A, B or C (ACA Statements)
- Information for other income
- Information for all deductions (including charitable contributions)/credits
- Total paid to day care provider and their tax ID number
- For direct deposit of refund, proof of account and bank's routing number
- For prior year returns, copies of income transcripts from IRS (and state, if applicable)

IRS e-file

IRS e-file is fast, more accurate, secure, and simple.

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