

**Send your documents to:
United Way of Pinal County, ATTN: VITA, PO Box 10541 Casa Grande, AZ 85130**

SCOPE OF SERVICE

“The Volunteer Income Tax Assistance (VITA) program offers free tax help to people who generally make \$57,000 or less, persons with disabilities and limited English speaking taxpayers who need assistance in preparing their own tax returns. IRS-certified volunteers provide free **basic** income tax return preparation with electronic filing to qualified individuals.” –IRS.GOV

DO YOU QUALIFY FOR FREE TAX PREPARATION THROUGH VITA?

Do any of the checkboxes apply to you?

- Total Income over \$57,000 (add all of your income plus your spouse’s income if any)
- Married Filing SEPARATELY where Community Property State (AZ) Rules apply (If you have dependent children, you may qualify for Head of Household and we can help you so DO NOT CHECK THIS BOX)
- Minister or Church Earnings
- Rental Income
- Deal with Virtual Currency (like bitcoins)
- Foreign Income
- Business Assets that require Depreciation
- Business Vehicle Expenses with Actual Expenses and Depreciation (If you take the standard mileage rate for your vehicle, DO NOT CHECK THIS BOX)
- Received form 1099-C or 1099-A and you will be excluding cancelled debt income due to insolvency (If the cancelled debt is for your MAIN HOME, DO NOT CHECK THIS BOX)
- Solar Panel or Plug-in Vehicle Credit
- Net Operating Loss Deduction (from previous year)
- Household Employment Taxes
- Military Income and Expenses (Please visit a Military Base VITA site as our volunteers are not certified to answer questions on Military Income, Expenses, or Deductions)

If you checked any of the boxes above, you do not qualify for our free tax service and will require a professional preparer. If you need help to determine if you qualify, please give us a call.

Questions? Call Our Office Number 520-836-0736
Or call a VITA representative directly 520-333-5152

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ENVELOPE STUFFER CHECKLIST (PLEASE SEND US COPIES IF POSSIBLE)

- FORM 14446 (This gives us authorization to prepare your taxes remotely)
- FORM 13614-C (This interview form helps us complete your return)
- Photo Identification for You and Your Spouse (if married) (For identity verification)
- SSN Cards for Everyone (This is to prevent identity theft and verify dependents)
- Income Forms (W2, 1099) (Usually, all income is reported on either a W2 or 1099)
- Expense Forms (1098) (Mortgage, Tuition, Student Interest, and more)
- Health Insurance Forms (1095) (If you purchased health insurance through the marketplace, we need your form 1095-A) (We don't require 1095-B or C)
- Profit and Loss Statement for Small Businesses or Self-Employed individuals*
- Itemized Deduction TOTALS (Medical Expenses, Taxes Paid, Charitable Contributions) **
- For Arizona Property Tax Credit: Proof of payment for Real Estate Taxes or AZ Form 201
- ADDITIONAL INFORMATION WORKSHEET (For state information and direct deposit)
- Letters from the IRS

***QUICK LESSON FOR SMALL BUSINESS OWNERS**

What is a Profit and Loss Statement? A profit and loss statement is basically a summary of all of your business income and all of your business expenses. Here is an example using a home cleaning business: Total home cleaning income: \$30,000, total supplies expense: \$10,000, total office supplies: \$500, total miles driven for the year: 20,000, total miles driven for business purposes only: 10,000.

****DO YOU HAVE MULTIPLE RECEIPTS?**

If you have multiple receipts or transactions, please do not send us all of your receipts. Add all of your like kind expenses and provide us with your totals. For example: Total business supplies \$5,000, Total medical expenses \$1000, total church donations: \$3,000. If you have donations that qualify for an Arizona Credit, we will need the receipt.

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February 17, 2021

Dear VITA Client,

Thank you for choosing our program and trusting us with the preparation of your tax return. Your privacy and security is and will always be held to the highest standards and at the end of the tax season, any of your sensitive documents that remain in our office, whether they are physical or virtual, will be shredded and/or deleted using Department of Defense standards for maximum security.

Because all of our walk-in locations are currently closed and we may not reopen for the remainder of the tax season, we offer our assistance through this mailed alternative method. So how does this mailed process work and will you need to take further action? Here is what to do next:

Fill out forms 13614-c (SP) and 14446 completely. Don't skip any questions. If you don't know or are unsure of a question on the interview form, please check the "Unsure" box or write N/A. Feel free to call me if you need clarification as you fill out the interview form. Review the checklist to make sure that you have all of your documents ready. We won't be able to complete your return if we are missing any forms.

I highly recommend that you send photocopies of your original tax documents in case you may need them for anything. Do not send original Photo Identification cards such as your Driver's License or original Social Security Cards. If you don't have a copy machine, I recommend going to your local OfficeMax, Office Depot, Walmart, Print Shop, Paper Store, or Packaging/Mail Service Shop as they will most likely have printing and copying services.

If you have any doubts or questions, do not hesitate to contact me directly.

Respectfully,

Jonathan Molina

Jonathan Molina – Level III Customer Support Specialist
United Way of Pinal County
Volunteer Income Tax Assistance (VITA) Program
Direct Number 520-333-5152
Office Number 520-836-0736

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PHOTO IDENTIFICATION AND DEPENDENT VERIFICATION

RECOMMENDED FORMAT

Your ID

Spouse's ID

Your SSN Card

Spouse's SSN Card

Dependent SSN Card

Dependent SSN Card

Dependent SSN Card

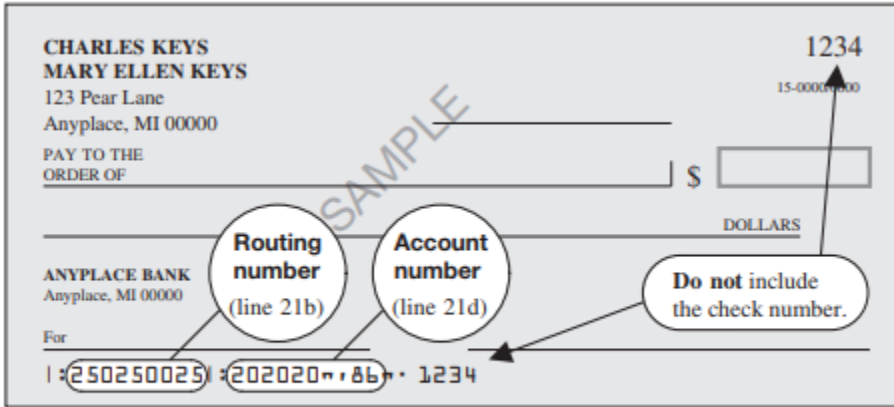
Dependent SSN Card

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ADDITIONAL INFORMATION WORKSHEET

For Direct Deposit (for refunds) or Direct Debit (if you owe)



The routing and account numbers may be in different places on your check.

Bank Name: _____

Routing Number: _____ Account Number: _____

STATE INFORMATION

In what states did you reside in? _____

If you resided in more than one state, please list each state and the dates that you moved to and from each state.

State 1 _____ State 2 _____ State 3 _____

ARIZONA PROPERTY TAX CREDIT FORM

If you are over 65 or receive Title 16 SSI, lived in Arizona all year, and either received very little income (under \$5,501, not counting Social Security) or your primary income is Social Security (or RRB equivalent), you may qualify for the AZ Property Tax Credit. Please have your landlord fill out form AZ 201 if you rent. If you own your home and pay property taxes, please attach proof of payment (cancelled checks, county receipts, 1098-Mortgage Interest Statement).

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ECONOMIC STIMULUS PAYMENT INFORMATION

Please enter the amount and date of each economic stimulus payment that you have received:

Amount: _____ Date Received: _____

Amount: _____ Date Received: _____

*Amount: _____ Date Received: _____ *

*Amount: _____ Date Received: _____ *

*You may have received two economic stimulus payments only. The additional lines are for married taxpayers who may have received separate economic stimulus payments. If you are married, and both you and your spouse are receiving social security income and did not file prior year taxes, you may have each received separate stimulus payments for a total of four payments.

WHEN FILLING OUT YOUR INTAKE INTERVIEW FORM

As you fill out your intake interview form and check the boxes for income, expenses, and life events, please make sure to write down any small details next to each box that you check or make a note in the lines provided. For example, if you checked the box that you made \$100 cash contributions to a non-profit organization and donated \$200 worth of stuff to Goodwill, please make a note for us; "I donated \$100 in cash to United Way and \$200 in stuff to Goodwill". Keep this in mind for all of the checkboxes so that we don't miss any deductions, income, or life event detail.

ONCE YOUR TAX RETURN IS FINISHED (PLEASE SELECT ONE)

- I would like my tax return mailed to me once it is completed
- I would like to pick up my tax return from the United Way office in Casa Grande
- I would like my tax return emailed to me (digital copy only)

FOR UNITED WAY USE ONLY

THIS PACKET WAS RECEIVED BY UNITED WAY VIA

- Online Upload by Agency or Volunteer: _____
- Mailed to PO Box
- Drop off at Main Office

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