

Free Tax Preparation

Hotline Memo

From: **Pro Seniors, Inc.**

Date: **3/10/2008**

Re: **Free Tax Preparation**

1) Summary

a) **AARP Tax Aide / TCE (Tax Counseling for the Elderly)**

- i) Telephone Tax-Aide site locator: [1-888-AARP-NOW](tel:1-888-AARP-NOW)
- ii) Web site Tax-Aide site locator:
https://locator.aarp.org/vmis/sites/tax_aid_locator_adv.jsp

b) **Volunteer Income Tax Assistance Program (VITA)**

- i) To locate the nearest VITA site, call United Way 211 (dial 2-1-1)
- ii) 1-800-906-9887, a special VITA (Volunteer Income Tax Assistance) site locator number that is available during Internal Revenue Services regular toll-free operating hours to locate the closest VITA site
- iii) Northern Kentucky web site Free Tax-Prep site locator:
<http://access.nku.edu/litc/taxprep3.htm>

c) **The Regional EITC Collaborative**

- i) Web site Free Tax-Prep site locator:
http://www.makeworkpay.com/where/hamilton_clermont

d) **CincinnatiUSA.com**

- i) Web site Free Tax-Prep site locator (Click link and search for "tax":
<http://www.cincinnatiusa.com/Calendar/kwresults.asp>

Bring the following documents to your appointment:

- Copy of previous year tax return. If necessary, contact the IRS for a copy of last year's return.
- W-2 forms from each employer
- All 1099 forms (1099-INT, 1099-DIV, 1099-misc., etc.) showing interest and/or dividends as well as documentation showing the original purchase price of your sold assets
- If you were paid Social Security benefits, bring your SSA-1099
- If you received a pension or annuity, bring your 1099R
- All forms indicating federal income tax paid
- If applicable, unemployment compensation statements
- Child care provider information (name, employer ID, SSN)
- If itemizing deductions, bring all receipts or canceled checks for items such as medical expenses, taxes paid, mortgage interest paid, and charitable contributions
- Social Security numbers for all dependents