

FREE Tax Return Preparation Assistance

WHEN: Every Saturday beginning February 5th through March 12th

TIME: 8:30 AM to 2:30 PM

WHERE: Gallagher Business Building, Room 108, University of Montana

WHAT: The VITA Program offers free tax help to those with low to moderate income (**\$57,000 and below**). IRS certified volunteers receive training to help prepare basic tax returns in our community.

Note: There is a separate appointment calendar for foreign students.

**IMPORTANT >> Tax assistance is by appointment only!!
Space is limited! Book your appointment now at:
<https://calendly.com/vita-3/vita-1>**

Note: Masks required. To maintain required social distancing we prefer that you do not bring children to your appointment

Items to bring to the VITA site to have your tax return prepared

- **Photo ID and either:**
 - Social Security Cards for you, your spouse, and dependents and/or a Social Security Number verification letter issued by the Social Security Administration, or
 - Individual Taxpayer Identification Number (ITIN) assignment letter for you, your spouse, and dependents
- **Information about Third Economic Impact Payment received in 2021 (IRS Letter 6475)**
- **Information about Advance Child Tax Credit received in 2021 (IRS Letter 6419)**
- Birth dates for you, your spouse, and dependents on the tax return
- Wage and earning statement(s) from all employers (Form W-2)
- Tuition statement(s) (Form 1098-T)
- Pension distributions statement (Form 1099-R)
- Health Insurance Marketplace Statement (Form 1095-A)
- A copy of last year's federal and state returns *if available*
- Interest and dividend statements from banks (Form 1099)
- Bank routing numbers and account numbers for direct deposits of refunds to your bank account
- Other tax related documents

Returns that contain the following items or Schedules cannot be prepared by our volunteers:

- Any return with incomplete information.
- Any return with a prior year carryover
- Schedule C: Expenses greater than \$5,000, with depreciation, or that shows a loss.
- Schedule D: Undocumented basis; Losses that are required to be carried over to the next year.
- Schedule E, Schedule F, and Schedule H are out of our scope