

# VITA

## Free Tax Preparation Assistance

Adapted from <https://www.unitedwaydm.org/vita-updates>

VITA services are a free, accurate, and convenient way to file your taxes. VITA will help those who qualify to receive Earned Income Tax Credit or Child Care Tax Credits.

### 2021 New Program Procedures and Eligibility Requirements:

- ✓ **No walk-in service.** All tax preparation services are by appointment only
- ✓ No admittance without an appointment, **no exceptions**
- ✓ **Call 211 to be screened for eligibility and to schedule an appointment**
- ✓ If you do not have all the required materials needed for a scheduled appointment, your appointment will be cancelled. No exceptions.
- ✓ We serve clients on a first come first served basis, until appointment available slots are filled
- ✓ There will be only one location for the United Way VITA Site

#### One VITA Site Location

1111 9<sup>th</sup> Street

Des Moines, Iowa 50314

### Income Guidelines

Individuals and families who meet the following household income thresholds within one year qualify to receive VITA's free tax preparation

- 1 Person in household: \$19,140 or less
- 2 People in household: \$25,860 or less
- 3 People in household: \$32,580 or less
- 4 People in household: \$39,300 or less
- 5 People in household: \$46,020 or less
- 6 Or more people in household: \$52,740 or less

**We serve clients on a first come first served basis, until available appointment slots are filled**

**Have Questions?**  
**Call 211**

## What is required to participate in VITA:

We want you to have a positive experience with VITA. Bring ALL required materials to help us provide you with a positive, accurate, and timely tax preparation meeting with VITA volunteers.

### You MUST bring all of the following items listed below:

- ☐ Proof of identification
- ☐ Social Security cards for you, your spouse and dependents and/or a Social Security number verification letter issued by the Social Security Administration
- ☐ Birth dates for you, your spouse and dependents on the tax return
- ☐ Current year's tax package, if you received one
- ☐ A copy of last year's federal and state returns
- ☐ Wage and earning statement(s) from all 2020 employers: Form W-2, W-2G, 1099-R
- ☐ Bring Notice 1444 or check stubs from the Economic Impact Payment Rebate received earlier in the year (i.e. \$1,200 per person)
- ☐ Interest and dividend statements from banks (Forms 1099)
- ☐ Bank routing numbers and account numbers for direct deposit. Blank check or deposit slip required.
- ☐ Total paid for day care provider and the day care provider's tax identifying number (the provider's Social Security number or the provider's business Employer Identification Number)
- ☐ **To file taxes electronically on a married-filing-joint tax return, both spouses must be present to sign the required forms**



You are required to bring a copy of last year's tax returns or a tax return transcript to prepare your taxes. We will not have access to last year's return information. To request your transcript, go to [www.irs.gov](http://www.irs.gov) and under "Tools," select "Get a tax transcript." After answering the questions, you can print your transcript. Or call 1-800-908-9946 and follow the prompts.

## Requirements for scheduled appointments at VITA:

- ✓ Face masks are required
- ✓ No children or guests allowed to Enter the tax preparation site at United Way of Central Iowa at your scheduled time
- ✓ If filing a joint return, spouse or companion must be in attendance

**Have Questions?  
Call 211**