

FREE Tax Preparation!

Bucks County Opportunity Council's
Volunteer Income Tax Assistance (VITA)

&

www.MYFREETAXES.com



*Did your household make \$54,000 or less in 2017? If so, you may be eligible for **FREE** tax preparation!*

February 1 through April 15. Taxes are prepared on a first come, first serve basis and **only during the below scheduled dates and times**. Please bring **ALL of your tax documents with you!** See back of flyer for a list of documents needed. Visit www.bcoc.org for more information.

**For joint returns, both taxpayer and spouse must be present.*

| | Quakertown | Warminster | Levittown | Newtown |
|---------------|--|---|--|---|
| Evening Hours | Wednesdays 4:00 pm - 8:30 pm | Wednesdays 4:30 pm-8:30 pm | Tuesdays 5:00 pm – 8:00 pm | N/A |
| Weekend Hours | Saturdays 9:30 am – 3:00 pm | N/A | Saturdays 9:30 am -3:00 pm | Saturdays 9:00 am – 2:00 pm |
| Location | Bucks County Opportunity Council 136C Mill Road Quakertown 18951 | St. Andrew's United Methodist Church 999 York Road Warminster 18974 | Foxwood Manor Community Center 2180 Veterans Highway Levittown 19056 | St. Mark A.M.E. Zion Church 136 N. Congress St. Newtown, PA 19040 |

Other Options for Free and Low Cost Tax Preparation Assistance

- \$ WWW.MYFREETAXES.COM for individuals or families with a combined income of \$66,000 or less. Help Line available!
- \$ AARP for Senior Citizens 888-687-2277 http://www.aarp.org/money/taxes/aarp_taxaide
- \$ Campaign for Working Families 215-454-6483 <http://www.cwfphilly.org>

BCOC's VITA program is sponsored by the Internal Revenue Service with support from the Bucks County Foundation & the Key Bank Foundation.

Please see other side for additional important information.

Documents required for Tax Preparation:



Bring the following Information for everyone in your household:

- \$ **Photo ID:** Valid driver's license, government or state issued ID is acceptable.
- \$ **Social Security Cards:** SSN or ITIN document **for you and all your dependents.**
- \$ **Date of birth and relationship:** make a list of ALL of your household members.
- \$ **Current address:** it may be different from the address on your employment records.

Additional Documents:

- \$ **W-2s:** for each job held in 2017, for each person in the household filing a return.
- \$ **1098s:** for school loans, mortgage and property tax payments.
- \$ **1099s:** showing any other income: unemployment, social security, school loans, health care reimbursement, state tax refund, gambling winnings, or subcontractor work.
- \$ **1095-A, B or C:** for proof of healthcare insurance.
- \$ **Income/Interest Statements:** received for any savings accounts or investments.
- \$ **Bank Account Numbers:** bring a "blank check" or a "letter" from your bank with your routing and account number for refund direct deposited.
- \$ **Last Year's Completed Tax Return**
- \$ **Business Expenses:** Self-employed expense receipts and mileage logs with totals.
- \$ **Charitable Donations:** list of contributions with receipts or statements and totals.
- \$ **Childcare Expenses:** daycare name, full physical address and phone number with Tax ID # or Social Security number of Child Care Provider and proof of payment statement for full year.
- \$ **College Forms:** 1098-T/1098-E with college statement and all receipts.
- \$ **Educator Expenses:** "out of pocket" supply receipts for each teacher or aide, grades K-12.
- \$ **Homeowners:** Form 1098 mortgage interest statement or 2017 real estate taxes paid receipt.
- \$ **Medical Expenses:** Doctor, pharmacy, hospital, and supplemental premium statements.
- \$ **Property Tax/Rent Rebate:** provide **PA 1000 RC** form from your landlord or proof of rent paid for the year, or a paid stamped copy of property taxes. Benefits are eligible to Pennsylvanians age 65 and older; widowers age 50 and older; and people with disabilities age 18 and older. The income limit is \$35,000 a year for homeowners and \$15,000 annually for renters with half of Social Security income not included in calculations.
- \$ **Retirement/IRA:** 2017 proof of contributions or withdrawals and year-end statements.

