

Jefferson Economic Development Institute

Volunteer Income Tax Assistance
sponsored by IRS
In partnership with the
Jefferson Economic Development Institute



How the VITA "Drop Off" Model Works

- "Drop Off" location — JEDI office — 205 Chestnut St., Mt. Shasta
- "Drop Off" tax documents every Friday from 1:00-4:00 PM beginning Jan. 27, 2017
- Must have all necessary tax documents at time of "Drop Off"
- "Drop Off" includes Intake Interview with Certified Volunteer
- Certified Volunteers prepare returns during the week
- Returns ready for "Pick Up" the following Friday between 9:00 & 12:00 PM
- "Pick Up" includes Quality Review of return with Certified Volunteer
- VITA free tax preparation only available for basic returns (Please see a paid professional for assistance with complicated returns)
- Jan. 27, 2017 first "Drop Off" day. Apr 7, 2017 last "Drop Off" day

IRS VITA/TCE return preparation sites are operated by certified volunteers. Site operating hours and services may be limited. In addition, by law, some sites provide priority services to seniors. Please be advised that you may not be immediately served. Your patience and understanding are appreciated.

What to Bring to the "Drop Off" Interview

- All Forms W-2 and 1099
- Information for other income
- Information for all deductions/credits
- A copy of last year's tax return
- Proof of account for direct deposit of refund (routing number and account number)
- Social Security cards or Individual Taxpayer Identification notices/cards for you, your spouse, and/or dependents
- Proof of Identification for yourself and/or your spouse
- Total paid to daycare provider and their tax ID number
- Birth dates for you, spouse and or dependents on the return
- Proof of foreign status if applying for ITIN
- Forms 1095 A, B or C (ACA Statements)

Facilitated Self Assistance—For returns beyond the scope of the VITA program, taxpayers may use myfreetaxes.com to self prepare their returns. Assistance may be available from certified volunteers on a limited basis. Taxpayers with an income below \$58,000 are eligible to use myfreetaxes.com to efile their Federal **and** State returns for free!



For more information check the
JEDI website ~
<http://e-jedi.org/vita-tax-assistance/>

Jefferson Economic Development Institute
205 Chestnut Street, Mt. Shasta, CA 96067
888.926.6670 ext. 15 ~ 530.926.6670 ext. 15