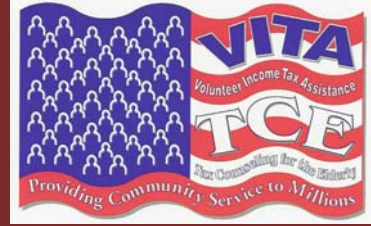


# Jefferson Economic Development Institute

## Volunteer Income Tax Assistance Sponsored by the IRS in partnership with the Jefferson Economic Development Institute



### *How the VITA “Drop Off” Model Works*

- Feb. 1, 2019 first “Drop Off” day. Apr 5, 2019 last “Drop Off” day
- “Drop Off” location — JEDI Office — 205 Chestnut St., Mt. Shasta
- “Drop Off” tax documents every Friday from 1:00—4:00 PM
- Must have **all** necessary tax documents at time of “Drop Off”
- “Drop Off” includes 30 minute Intake Interview with a Certified Volunteer
- Certified Volunteers prepare returns the following week
- Returns ready for “Pick Up” the following Friday from 9:00—12:00 PM
- “Pick Up” includes 30 minute Quality Review with a Certified Volunteer
- VITA free tax preparation available for basic returns (please see a paid professional for assistance with complicated returns)

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” Intake Interview

- All Forms W-2 and 1099
- Information for other income
- Information for all deductions/credits
- A copy of last year’s tax return if available
- Routing number and account number for direct deposit of refund
- Social Security cards or Individual Taxpayer Identification notices/cards for you, your spouse, and/or dependents
- Proof of Identification for self and/or spouse and a valid contact number
- Total paid to daycare provider and their tax ID number
- Birth dates for you, spouse and or dependents on the return
- Forms 1095 A, B or C (ACA Statements)
- Taxpayer **and** Spouse must sign at time of pick up

### My Free Taxes and Facilitated Self Assistance

For returns beyond the scope of the VITA program or for taxpayers who wish to learn how to prepare their own returns, individuals may use [myfreetaxes.com](http://myfreetaxes.com). Assistance may be available from certified volunteers on a limited basis. Call for an appointment. Taxpayers with an income below \$64,000 are eligible to use [myfreetaxes.com](http://myfreetaxes.com) to efile their Federal **and** State returns for free! Go to [www.myfreetaxes.com](http://www.myfreetaxes.com) and click on the “File for Free” link on the **left!**



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

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