FREE

Income Tax Assistance in Portage County

VITA **Volunteer Income Tax Assistance**
For moderate to low income people of all ages (household income in 2011 $50,000 or less)

TCE **Tax Counseling for the Elderly**
Administered by AARP Tax-Aide for moderate to low income people with special consideration for those age 60 or older

Moderate to low income individuals/families and those 60 and over qualify for free tax assistance.

Starting January 9, 2012
Simply dial 2-1-1
Monday – Friday, 8 am – 5 pm
to schedule your free tax appointment

2-1-1 is United Way's free and confidential Community Info line

TAX PREPARATION LOCATIONS:

Aging & Disability Resource Ctr – Lincoln Ctr (TCE)
1519 Water Street, Stevens Point
Taking Thursday and Friday Appointments

Portage County Public Library (TCE)
1001 Main Street, Stevens Point
Taking Saturday Appointments

Mid-State Technical College (VITA)
933 Michigan Avenue, Stevens Point
Taking Tuesday, Thursday, and Saturday Appointments

Tax preparation services start on February 2 and run through April 14.

Note: Some complex tax situations are beyond the scope of our volunteer's training and cannot be handled. These include part-year residents, states other than WI, divorce during 2011, foreclosure, business (certain simple self-employment is OK), farm, rental income, depreciation.

Tax preparation services brought to you through a collaborative effort with AARP Tax-Aide, Aging and Disability Resource Center-Lincoln Center, CAP Services, Portage County Library, Mid-State Technical College, United Way of Portage County, and United Way's 2-1-1.

*If you experience difficulty connecting to 2-1-1 using your cell phone, please dial 1-800-922-5590.

WHAT TO BRING TO APPOINTMENT:

SUMMARY:
* Social Security Cards
* Driver's License or picture ID
* Last year's tax return
* All W-2s, 1099s, and other income statements
* All expense statements to support any adjustments/deductions/credits
* For Homestead Credit, property tax bill or original Rent Certificate
* Direct Deposit bank account info (optional)

DETAILS:
The following is a comprehensive list of documents that are related to tax preparation. Not everyone will have each of these documents. Bring any documents you have received in the list below, or any documents that you receive in the mail marked as Tax Documents.

* Social Security Cards for you, your spouse, and all dependents
* Driver's License or other picture ID
* Last year's (2010) Federal and state tax returns (if you have them)
* Records of income tax refunds received and balance due paid during 2011
* Records of estimated taxes paid towards 2011 taxes
* 2011 Forms W-2- wage statements from all jobs
* 2011 Forms W-2G - gambling income
* 2011 Forms 1099-INT - interest received
* 2011 Forms 1099-DIV - dividends paid to you
* 2011 Forms SSA-1099 - social security income
* 2011 Forms RRB-1099 and RRB-1099-R - railroad retirement
* 2011 Forms 1099-R - pension income
* 2011 Forms 1099-MISC - non-wage earnings, contract jobs
* 2011 Forms 1099-B - sale of stock (also bring the date you bought it and how much you paid), other investment activity
* 2011 Forms 1099-G - unemployment, tax refunds
* Any other 1099 form you receive for 2011
* Records of any other income during 2011, both taxable and nontaxable (for example, alimony, jury duty, SSI, SSD, Wisconsin Works (W2) payments)
* 2011 Forms 1098-T - Tuition payment statements
* 2011 Forms 1098 - Mortgage Interest statements
* Records of amounts paid into or taken out of any IRA or other retirement plan
* Records of any medical expenses, health insurance premiums, charitable contributions, employee business expenses, mileage logs, education expenses, childcare expenses (and childcare provider info including tax ID), or other expenses qualifying you for a deduction or credit
* Records of rent/property tax paid (for any year) during 2011
* For Homestead Credit, your 2011 Property Tax bill (due during 2012) or your 2011 Rent Certificate
* To direct deposit your refund, have your checkbook available so we can get the proper account information

ACCOMMODATIONS FOR DISABILITIES:
All sites are fully accessible

ELIGIBILITY: Free tax services are geared at moderate to low income individuals over 60 years of age. Free tax services are for simple tax returns. Some taxpayers have situations that require a tax form that is outside the scope of our program, our training and the IRS certification. Additionally,
Taxpayers must have lived in Wisconsin for all of 2011 and taxpayers MUST NOT HAVE:
* worked in any other state in 2011
* become divorced, meaning that a final judgment was issued during 2011
* been forced to leave their home during 2011 because a bank foreclosed on it

INTAKE PROCEDURE: Appointments are required. Call United Way's 2-1-1, Mon - Fri between 8am-5pm to schedule an appointment starting Jan. 9, 2012. Free tax appointments take place at the Charles M. White Library, the Lincoln Center and Mid-StateTechnical College. Homebound services are not available.

FEES: None.

HOURS: By appointment only. Appointment days and hours vary by site. A list of sites and appointment days and times is found on the reverse side of this form

AREA SERVED: Portage County.