

# FREE Tax Preparation!

Bucks County Opportunity Council's  
Volunteer Income Tax Assistance (VITA)  
&  
[www.MYFREETAXES.com](http://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](http://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 18940

## **Limited Hours (9:30 am to 2 pm) in Doylestown**

Location: Bucks County Opportunity Council 100 Doyle Street, Doylestown, PA 18901

**2/1, 2/8, 2/15, 3/1, 3/8, 3/22 and 3/29**

**4/12 – Completed Returns, Pickups Only.**

## **Other Options for Free and Low Cost Tax Preparation Assistance**

- \$ [WWW.MYFREETAXES.COM](http://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](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, First National Bank & Trust Co. of Newtown & 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.

