

VITA LOCATIONS



VOLUNTEER INCOME TAX ASSISTANCE

SDC-Main Office

1730 W. North Ave.
Milwaukee, WI 53205

Jan 31st - April 18th

MWF: 8:30am - 4pm
(Closed for lunch at 12 - 1pm)

TTH: 10:30am - 6pm
(Closed for lunch at 2 - 3pm)

S: 8am - 1 pm

April 19th - June 30th

M-F: 9am - 3pm

SDC-Teutonia

6848 N. Teutonia Ave.
Milwaukee, WI 53209

Jan 31st - April 18th

MWF: 8:30am - 4pm
(Closed for lunch at 12 - 1pm)

TTH: 10:30am - 6pm
(Closed for lunch at 2 - 3pm)

S: 8am - 1 pm

April 19th - Oct 14th

M-F: 8:30am - 5pm

SDC-Southside

2968 S. Chase Ave.
Milwaukee, WI 53207

Jan 31st - April 18th

MWF: 8:30am - 4pm
(Closed for lunch at 12 - 1pm)

TTH: 10:30am - 6pm
(Closed for lunch at 2 - 3pm)

S: 8am - 1 pm

April 19th - Oct 14th

M-F: 8:30am - 5pm

SDC-Southwest

9004 W. Lincoln Ave.
West Allis, WI 53223

March 1st - April 18th

MWF: 8:30am - 4pm
(Closed for lunch at 12 - 1pm)

TTH: 10:30am - 6pm
(Closed for lunch at 2 - 3pm)

S: 8am - 1 pm

SDC-Northwest

9155 N. 76th St.
Milwaukee, WI 53223

Jan 31st - April 18th

M-F: 8:30am - 4pm

Drop Off Only By Appointment

Call: (414) 326-2874

Prior years returns

VISIT cr-sdc.org or CALL 414.906.2700

VITA Information Line - 414.963.2694

*Empowering Milwaukee County residents
with the resources to move beyond poverty.*

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SAVE HUNDREDS OF DOLLARS ON TAX PREPARATION FEES

FREE TAX HELP

FOR FAMILIES AND INDIVIDUALS WHOSE
HOUSEHOLD INCOME IS \$66,000 OR LESS
PER YEAR

Our IRS-Certified Preparers are ready to help you with:

- FREE preparation and e-filing of your tax return
- Screening to help you claim your Earned Income Tax Credits and Child Tax Credits
- Online Self-Prep using FREE software with Tax Preparer assistance. *For household incomes that are \$73,000 or less*
- Homestead filing
- Assistance with current tax year and prior years (2016-2020) including amendments.

Get your taxes done for FREE.
No hidden fees or expenses.
Keep your money in your pocket!

DROP-OFF, FREE SELF-PREPARE & VIRTUAL OPTIONS

Drop-Off: Download intake forms or stop by office for packet. This option is for individuals or families with a household income of \$66,000 or less.

Online Self-Prep: Prepare your own tax return using a FREE software link with assistance as you prepare. Household income limit is \$73,000.



CR- Social Development Commission is an Equal Opportunity Employer and Service Provider. Auxiliary aids and services are available upon request to individuals with disabilities. If you need this information interpreted to a language you understand or in a different format, please contact La Toya Jones, Equal Opportunity Officer, at 414-906-2823 or ljones@cr-sdc.org. Callers who are deaf or hearing or speech-impaired may reach us at Wisconsin Relay Number 711.



414.906.2700



info@cr-sdc.org



www.cr-sdc.org

WHAT YOU NEED TO BRING

- Social Security cards (or ITIN cards) for you, your spouse (if joint return is filed) and all dependents.
- Valid picture identification.
- Taxpayers filing a joint return must both be present when the tax returns are prepared. Both spouses must sign a joint tax return.
- All informational statements, including but not limited to:
 - * Wage statements Form(s) W-2 & 1099.
 - * Interest and Dividend statements Form(s) 1099-INT & 1099-DIV.
 - * Mortgage interest statements Form 1098.
 - * Pension and Social Security statements Form(s) 1099-R & SSA-1099.
 - * Letter indicating Federal & State SSI payments received for the full year.
 - * Tuition payments statements Form(s) 1098-T, 1098-E, University Account Statement
- Property tax receipts for any property taxes paid in tax year.
- IRS 1444-A, 1444-B, and 1444-C - Economic Impact Payment Notices.
- Information about any other sources of income, both taxable and nontaxable, and deductions and expenses you may have such as charitable contributions and child care expenses. If you have child care expenses please have your child care provider's taxpayer ID number.
- Form 1095-A, if participated in the Marketplace Affordable Health Care.
- If self-employed, you must complete the Self-Employment Tax Organizer (SETO) for each tax year.
- A printout of any Wisconsin Works (W-2) payments, child support, kinship payments, Federal, Social Security and/or Federal and State SSI income you have received.
- A voided check for a checking account direct deposit or a deposit slip for a savings account direct deposit of your refund. **Direct deposit is the fastest way to get your refund!**
- A complete copy of your prior year federal and state income tax returns filed is helpful but not required.

WE APPRECIATE OUR SUPPORTERS



WISCONSIN HOMESTEAD FILERS

Eligibility

- You must be 18 and your household income must be under \$24,680 or less.
- Must be a legal resident of Wisconsin for the entire year (Jan 1 - Dec 31 of the tax year you are filing).
- You must meet one of the following conditions:
 - * You had earned income during tax year.
 - * You (or your spouse) are disabled.
 - * You (or your spouse) are 62 years of age or older at the end of the year.
- You cannot be claimed as a dependent for the year by someone else.

Documentation for Wisconsin Homestead Credit Filing (Required)

- You must have your social security card and current photo ID.
- Proof of disability (if under age 62) **(New Requirement)**:
 - * Statement from Veterans Administration certifying that claimant is receiving disability benefit due to 100% disability, or
 - * Document from Social Security Administration stating date disability began, or
 - * Statement from physician stating beginning date of disability and whether disability is permanent or temporary.
- Completed rent certificate without any errors or a copy of the City of Milwaukee property tax bill (if you are a homeowner.) Note: If the landlord refuses to complete a rent certificate, you must include proof of rent payments. The State will only accept money order receipts or canceled checks. The State will not accept handwritten rent receipts or checkbook receipts.
- Proof of all sources of household income, such as Social Security, Federal and State SSI benefits, caretaker supplement payments, kinship payments, child support, and/or printout of Wisconsin Works (W-2) benefits.

THE FOLLOWING ARE CONSIDERED OUT-OF-SCOPE AND CANNOT BE SERVICED

- Married filing separate
- Non-resident or partial year resident returns
- Out-of-state returns
- Non-individual returns (corporations, trusts, etc.)
- Rental property
- Self-employment activity with business expenses that exceeds \$35,000
- Railroad retirement
- Adjustments to income, such as moving expenses
- Combat pay/military pay
- Cancellation of debt (form 1099-C)
- Kiddie Tax Returns (form 8615)