FREE TAX PREP

GET YOUR TAXES DONE FOR FREE

Household income must be $58,000 or less to qualify for VITA Free Tax Preparation Assistance.
Earned Income Tax Credit phases out at $54,884.

4 Locations to Better Serve You!!

January 21 - April 15

SDC-Main Office ♦
1730 W. North Avenue
Milwaukee

SDC-Teutonia ♦
6848 N. Teutonia Avenue
Milwaukee

SDC-Southside ♦
2968 S. Chase Avenue
Milwaukee

♦ Super Site

Location Hours:
M, W, Thur 11am - 8pm
Tue, F 8am - 5pm
Sat 8am - 1pm

For faster service, schedule your appointment at sdc.cascheduler.com or by phone at 414.206.2262

Homestead ONLY (appointment only)

United Way Volunteer Center
200 W. Pleasant Street
Milwaukee

Parking available West of entrance.

Location Hours:
Tues 1pm - 4pm
Wed 4pm - 7pm
Fri 9am - 12pm

Super Saturday
February 29: 9am - 2pm

SITE SPONSORED BY:

United Way
Greater Milwaukee & Waukesha County

For additional information, please visit cr-sdc.org
call 414.963.2694 or 211

sdc Social Development Commission

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.

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.
- 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
- A completed, error free and signed rent certificate or copy of your property tax bill if you are claiming the Wisconsin Homestead credit
- 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.

Wisconsin Homestead Filers

Eligibility

- You must be 18 and your household income must be under $24,680 or less
- You must meet one of the following conditions *(New Requirement)*
  - 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 forms 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…)
- Rental property
- Self-employment activity with business expenses that exceeds $25,000
- Capital gains/losses
- Dividends
- Railroad retirement
- Adjustments to income, such as moving expenses
- Combat pay/military pay
- Cancellation of debt (form 1099-C)

We appreciate our Partners & Funders

IRS

Wisconsin Department of Revenue

United Way Greater Milwaukee & Waukesha County

Forest County Potawatomi Foundation

Northwestern Mutual

MABC Milwaukee Asset Building Coalition

Social Development Foundation