

FREE TAX PREP

GET YOUR TAXES DONE FOR FREE **VITA**
VOLUNTEER INCOME TAX ASSISTANCE PROGRAM

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

5 Locations to Better Serve You!!

January 22 - April 17 (Closed March 30 & 31)

- SDC-Main Office** ♦ & M,T,W,F 8am - 5pm
1730 W. North Avenue
Milwaukee
Thur 10am - 8pm
Sat 8am - 1pm
- SDC-Teutonia** ♦ & M,T,W,F 8am - 5pm
6848 N. Teutonia Avenue
Milwaukee
Thur 10am - 8pm
Sat 8am - 1pm
- SDC-Sixteenth Street
Community Health Center** ♦ & M,W,Th,F 8am - 5pm
2906 S. 20th Street
Milwaukee
Tues 10am - 8pm
Sat 8am - 1pm

* Limited Walk-in Service
(Customers with appointments will be served first)

** If filing HOMESTEAD ONLY (10 per day per location)

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

January 26 - March 24 (Appointments only)

- Journey House** & Mon 2pm - 9pm
2110 W. Scott Street
Milwaukee
Wed 2pm - 9pm
Fri 9am - 3pm
Sat 9am - 3pm

Appointments only. For faster service, schedule your
appointment at journeyhouse.cascheduler.com
or by phone at **414.647.0548**

January 23 - April 16 (Appointments only)

- La Casa de Esperanza** & M,W,F, Sat 9am - 12pm
202 E. Broadway
Waukesha
Tu,Th 4pm - 6:30pm

Appointments only. To schedule an appointment
call **262.832.1534**

♦ Super Site & Wheelchair Accessible



For additional information, please visit cr-sdc.org
call **414.963.2694** or **2-1-1**



SDC does not discriminate in its programs, activities, facilities, employment, or educational opportunities on the basis of a person's sex, race, age, religion, national origin, ancestry, creed, pregnancy, marital or parental status, sexual orientation, or disability.

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
- Taxpayer's 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:
 - Wages statements (Form(s) W-2 and 1099)
 - Interest and Dividend statements (Form(s) 1099-INT & 1099-DIV)
 - Mortgage interest statements (Form(s) 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 2016
- 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 childcare expenses please have your childcare provider's taxpayer ID number
- Forms 1095-A, B or C, Affordable Health Care Statements
- A completed, error free and signed rent certificate or copy of your 2016 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 2016 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 have earned income during the 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 Veteran's 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 cancelled 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 W2 benefits.

The following forms are considered out of scope and cannot be serviced.

- Married filing separate
- Non-resident or part year resident returns
- Out of state returns
- Non-individual returns (corporations, trusts...)
- Rental property
- Self-employment activity with business expenses that exceeds \$5,000
- Capital gains/losses
- Dividends
- Railroad retirement
- Adjustment to income, such as moving expenses
- Tip income (wait staff, etc.)
- Combat pay/military pay
- Cancellation of debt (form 1099-C)

