

# IRS Certified Volunteers Provide

## FREE TAX PREPARATION



In cooperation with the Internal Revenue Service, trained and certified CSVP volunteers will provide FREE income tax preparation for persons in either of these categories:

- Seniors 60 years of age or older (any income level) OR
- Persons with an income of \$58,000 or less, regardless of age

**Conejo Creek South Community Building**  
1350 E. Janss Rd., Thousand Oaks, 91362  
Mondays, Tuesdays, Wednesdays,  
Thursdays, and Fridays  
**Monday, February 6 - Friday, April 14, 2023**  
**8:30am - 4:00pm**

**SPANISH TRANSLATION AVAILABLE**  
**MONDAYS, 12noon - 4:00pm &**  
**Wednesdays, 8:30am-4:00pm**

**MANDARIN TRANSLATION AVAILABLE**  
**FRIDAYS, 8:30am - 4:00pm**

**Newbury Park Library**  
2331 Borchard Rd., Thousand Oaks, 91320  
WEDNESDAYS ONLY  
**Wednesday, February 8 -**  
**Wednesday, April 12, 2023**  
**10:00am - 4:00pm**

**MANDARIN TRANSLATION AVAILABLE**  
**10:00am-4:00pm**

### WHAT TO BRING

- For married filing joint, both spouses must be present
- Photo identification
- Social Security cards or Individual Taxpayer Identification Number documents for you, your spouse, and dependents
- Birth dates for you, spouse, and dependents
- A copy of last year's Federal and State tax return
- All Forms W-2, 1098, and 1099
- Interest and dividend statements (1099-INT; 1099-DIV; 1099-B)
- Form 1095-A and FTB 3895 (Marketplace Health Insurance)
- Other relevant information on income, expenses, deductions
- Information for all deductions/credits
- Total paid to day care provider and their tax ID number
- Bank Routing numbers for direct deposit
- For prior year returns, copies of income transcripts from IRS if Form W-2 not available

### WILL PREPARE TAX RETURNS THAT INCLUDE

- Wages, salaries, etc. (Form W-2)
- Interest Income (Form 1099-INT)
- Dividends Received (Form 1099-DIV)
- State Tax Refunds (Form 1099-G)
- Unemployment Benefits (Form 1099-G)
- IRA Distributions (Form 1099-R)
- Pension Income (Forms 1099-R, CSA-1099)
- Social Security Benefits (Form SSA-1099)
- Capital Gain/Loss (Form 1099-B)
- Sale of Home (Form 1099-S)
- Self-employed Income (Form 1099-MISC, 1099-NEC, 1099-K)
- Gambling Winnings (Form W-2G)
- Cancellation of Debt (Form 1099-C)
- Health Savings Accounts (Form 1099-SA)
- Itemized Deductions
- Education Credits (Form 1098-T)
- Child Tax Credit
- Earned Income Credit
- Prior Year and Amended Returns
- Business income/expenses for Schedule C (ONLY if there is a profit and expenses are under \$35,000; no home use, inventory, or depreciation)

### CANNOT PREPARE

- Schedule E (No Rentals)
- Out-of-state-returns
- Married filing separate returns
- Returns with more than four K-1's