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 <u>Mondays, Tuesdays, Wednesdays,</u> <u>Thursdays, and Fridays</u> 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

WHAT TO BRING

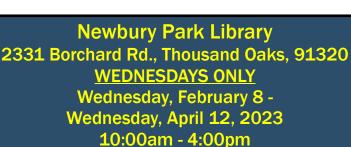
- · For married filing joint, both spouses must be present
- Photo identification
- Social Security cards or Individual Taxpayer Identification Number documents for you, your spouse, and dependents
- Birth dates for you, spouse, and dependents
- A copy of last year's Federal and State tax return
- All Forms W-2, 1098, and 1099
- Interest and dividend statements (1099-INT; 1099-DIV; 1099-B)

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)

CANNOT PREPARE

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



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

- 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
- 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)



