



CSVP Volunteers

Provide Income Tax Assistance

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 \$56,000 or less, regardless of age

Goebel Adult Community Center
1385 East Janss Road, Thousand Oaks, CA 91362

TAX PROGRAM WILL PROCEED DEPENDING ON STATE/COUNTY HEALTH ORDERS & GUIDELINES. COUNTY WILL NEED TO BE IN RED TIER OR BETTER TO ENSURE THE SAFETY OF VOLUNTEER PREPARERS AND CLIENTS. WE ARE CURRENTLY WORKING WITH TAX COORDINATORS AND THE IRS ON A HYBRID VIRTUAL/IN-PERSON PROGRAM WITH LIMITED APPOINTMENTS. WE HOPE TO HAVE MORE INFORMATION BY THE BEGINNING OF FEBRUARY.

Please visit the CSVP website for updated information. www.crpdpd.org/csvp

Participants MUST bring the following items:

- Photo identification
- Social Security card (this is required for all dependents as well as taxpayer)
- A copy of last year's Federal and State return (we will not have access to any past years tax information and we do not want you to miss out on credits)
- Birth dates for you, your spouse, and dependents on tax return
- Wage and earning statements (W2's and 1099's); Social Security Benefits (1099-SSA) plus any pensions, annuities and IRA/401(k) distributions (1099-R's)
- Interest and dividend statements (1099 INT; 1099 DIV; 1099 B) as well as the cost of stocks and bonds with the date bought and sold
- Health Insurance Exemption Certificate, if received
- If any family member obtained medical insurance from Covered California, a copy of your 1095-A Health Insurance Marketplace Statement is required.
- Bank routing numbers and account numbers for direct deposit
- Other relevant information about income, expenses and deductions

We DO NOT provide Income Tax Assistance for the following:

- NO rentals (Schedule E)
- Business income/expenses for Schedule C—ONLY if there's a profit and expenses are Under \$35,000; NO home use, inventory, or depreciation
- NO out-of-state returns
- NO married filing separate returns

For more information, contact the Conejo Senior Volunteer Program at 805-381-2742 or csvp@crpd.org