

IRS Certified Volunteers Provide

FREE TAX RETURN PREPARATION



In conjunction 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 \$60,000 or less, regardless of age

Conejo Creek South Community Building

1350 E. Janss Rd., Thousand Oaks, 91362

Mondays, Tuesdays, Wednesdays,

Thursdays, and Fridays

February 1 - April 12, 2024

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 7 -

Wednesday, April 10, 2024

10:00am - 4:00pm

MANDARIN TRANSLATION AVAILABLE

10:00am-4:00pm

No appointments taken - First-come, first-served basis. Please read all information.

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 (Marketplace Health Insurance)
- Other relevant information on income, expenses, deductions
- Information for all deductions/credits
- Total paid to child care provider and their tax ID number
- Bank Routing numbers for direct deposit

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

*This program is not a Thousand Oaks Library sponsored event