



A New Leaf VITA Site Service

The VITA Program provides free federal and Arizona state tax preparation and e-filing services for individuals and families with an annual household income of less than \$69,000.

IRS-certified volunteers assist with basic tax returns for individuals and families with low or limited income, non-English speakers, persons with disabilities, seniors, veterans, Native Americans, and homeless individuals.

Most sites operate on a walk-in, first-come, first-served basis.

Taxpayers are responsible for providing all required tax documents and truthful, accurate information.

Important:

- VITA volunteers prepare returns based solely on the information provided by the taxpayers.
- VITA volunteers are not responsible for errors caused by missing or incorrect information.
- Taxpayers are ultimately responsible for the accuracy of their tax return.



What can West Valley VITA sites do for you?

A New Leaf VITA volunteers are trained to assist low- to moderate-income taxpayers in filing certain tax forms and schedules, including Form 1040. However, the Volunteer Protection Act requires that our volunteers stay within the scope of the program. If volunteers feel they do not have adequate knowledge or your return is too complex, you may need to seek another qualified volunteer or will need to seek professional help.

We can prepare

Form 1040 with Schedules A, B, D and E (Only Royalties)

Schedule C if no employees, no inventory, no losses or depreciation or expenses for business use of home, etc.

1099- NEC or MISC; box 7 (nonemployee compensation) reported on Schedule C

Schedule EIC and EIC Worksheets

1099-MISC (Other income & royalties, reported on Schedule E with no expenses, depreciation.)

Schedule E Rental Properties (Active-Duty Military ONLY)

Form 1040-ES (Estimated Payments)

Form 2441 (Child & Dependent Care)

Form 5405 (Repayment of First Time Home Buyers Credit)

Non-cash contributions Less than \$500.

Form 8379 (Injured Spouse)

Form 8812 (Additional Child Tax Credit)

Form 8880 (Qualified Savings Credit)

Form 8863 (Education Credits)

Form 9465 (Installment Agreement)

Form 1040X (Amended Returns, ONLY if prepared at the site prior year)

Schedule K-1 (ONLY for interest, dividends and capital gain distributions and royalties)

Cancellation of Mortgage Debt—1099-A and/or 1099-C and Form 982 or 1099-C for Personal Credit Card Debt.

Health Savings Accounts—1099-SA

We cannot prepare

Married Filing Separate

Schedule C:

- Hobby income or not-for-profit activity
- Inventory
- Expenses exceed \$35,000
- Cost of Goods sold
- Expenses for employees
- Business use of home
- Depreciation or asset write-offs
- Casualty losses
- Accrual Methods of accounting
- Net losses

1099-R, Box 7: Codes 5, 8, 9, A, E, J, K, N, P, R, T & U

1099-C: If filed for bankruptcy

Schedule D: Complicated and advanced Capital Gains and Losses

Schedule E: Rental Property (if NOT Active-Duty Military member)

Schedule F: Farm Income

Form 8606: Non-Deductible IRA

Form 8615: Minor's Investment Income

Form SS-5: request for Social Security

Form SS-8: Worker Status Determination

Schedule K-1: that involves depreciation or deductible expenses

Non-Cash Charitable donation over \$500

This is NOT a comprehensive list, consult a VITA volunteer for a complete list of In-Scope or Out-Of-Scope items