



Don't pay to file your taxes.

Using our VITA free tax prep program, our IRS-certified preparers will file your taxes safely and accurately at no cost.



Ways to file:

In-person VITA*

Make an appointment or walk in at one of our sites.

Virtual VITA*

Upload photos of your tax documents from your phone or tablet to our encrypted platform. We will call you while working on your return.

Do It Yourself

Use our free, do-it-yourself platform that has a helpline if you get stuck. No income restrictions. Visit myfreetaxes.com to get started.

Visit unitedwayfilefree.com or call 211 to get started.



*VITA is in partnership with the IRS. To qualify, your 2023 household income must be less than \$70,000.

What everyone needs to file:

- Government-issued **photo ID** for you and for your spouse if you are filing a joint return. Please note: Both spouses must be present if filing a joint return. If you are Married Filing Separate, you will need your spouse's Social Security Number and date of birth.
- Original Social Security cards or ITINs** for everyone in your household on the tax return—NO exceptions. SSA-1099 is also accepted.
- All W-2s and other income documents.** This may be Social Security income, Retirement Income, Unemployment, Interest, Dividends, Cash Income, Gambling Income, Self-employment Income.
- For the refund to be deposited directly to your bank (the safest and fastest way), you will need the **routing number and account number**. This can be found on a check. You can split your refund into two or three different bank accounts, like checking and savings. Spouses can split their refund.

You may also need:

- If you have children in daycare, you will need **proof of childcare expenses**. You should receive a form from the daycare.
- If someone in your household is in college, you will need form **1098-T** and student account statement from the school along with any other expenses, such as books.
- If someone in your house was self-employed, you need a copy of their **1099** statement(s) and details about their work expenses.
- If you have health insurance through the Marketplace, please have form **1095-A** ready.
- If you or your spouse has a **Health Savings Account (HSA)** you will need Form 1099-SA and/or Form 5498-SA. Form 1099-SA has the amount of money spent from your HSA account and Form 5498-SA has the amount of money contributed to your HSA account.
- If you have been a victim of identity theft, you will need your **Identity Protection PIN Number** issued by the IRS.
- If you give to **charitable organizations**, have the dollar amount contributed ready.
- Most people take the standard deduction rather than itemize. If you want to itemize, or if you are unsure if you can itemize, gather all medical expenses, property tax and mortgage interest. If you made a major purchase with a high dollar amount of sales tax, such as a vehicle, you will need a receipt showing the amount of sales tax you paid.
- A copy of your **last year's tax return** is optional.



Visit [UnitedWayFileFree.com](https://www.unitedwayfilefree.com)
or call **211** to get started.