

VITA Site Services

Volunteer Income Tax Assistance Program offers free Federal and Arizona State tax preparation for individuals or families with annual income less than \$57,000.

Trained volunteers will prepare basic tax returns, particularly for those with low or limited income, non-English speaking persons and persons with disabilities.

We also reach out to Veterans, Native American, and the homeless population. Customers are seen on the first come, first service basis.



What West Valley VITA sites can do for you today.

A New Leaf VITA volunteers are trained to assist low- to moderate-income taxpayers in filing certain tax forms and schedules, including the Form 1040. However, the Volunteer Protection Act requires that our volunteers stay in 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
- **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 (box 1 or 2—** rents, royalties, reported on Schedule E with no expenses, depreciation)
- **1099-MISC box 3** (other income)
- **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 8888** (Allocation of Refund – Split refund)
- **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:** Code 7 with IRA/SEP/SIMPLE box is checked, 5, 6, 8, 9, A, E, J, K, N, P, R, T, U, & W
- **1099-C:** If filed for bankruptcy
- **Schedule D:** Complicated and advanced Capital Gains and Losses
- **Schedule E:** Sale of Rental Property
- **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 (if itemizing)**