VITA TAX PROGRAM

United Way of Washtenaw County

OFFICE OF COMMUNITY & ECONOMIC DEVELOPMENT

Collaborative solutions for a promising future

VITA Tax Preparation Program

- **VITA or Volunteer Income Tax Assistance** provides basic tax preparation assistance to individuals and families with a household income of approximately $54,000 a year or less.
  - Nationwide IRS sponsored program
  - Located at United Way 2305 Platt Road, Ann Arbor
  - February 1st to April 14th, every Thursday 5-8:30 pm, Saturday 9 am-5 pm,
  - Michigan Works, every Tuesday 1pm-7pm
  - **Appointment only – 734-677-7235**
- **VITA at Eastern Michigan University College of Business**
  - February 10, 17 | March 3, 10, 17, 24 | April 7, 14
  - **Walk-ins only**

MyFreeTaxes.com

- **MyFreeTaxes.com**
  - Individuals or married couples that file up to $66,000 qualify
  - Sponsored by United Way and Powered by H&R Block

VITA Scan & Go

- Manchester Resource Community Center
  - Appointment Only- 734-428-7722
  - 410 City Road, Manchester

- Chelsea Senior Center
  - Appointment Only- 734-475-9242
  - 512 E. Washington Street

- Scan & Go service allows clients to have their tax documents prepared at United Way without having to travel from Manchester and the surrounding communities.

Out of scope for VITA

- We cannot prepare returns with:
  - Schedule C with more than $10,000 in business expenses
  - Schedule E (Rental property income)
  - Schedule F (Profit or loss from farming)
  - Income over $54,000 (unless the client has a disability, elderly, or ESL)
  - Some cancellation of debts

Important Documents

Make sure to bring ALL of these documents with you to your appointment:

Please note: If you are filing jointly, both adults must be present at the appointment to sign the tax return.

- ◊ Social Security card for each family member and picture ID for all adults
- ◊ W-2 forms for all jobs worked the previous year
- ◊ Proof of rent or mortgage and property tax payments
- ◊ Childcare provider’s name address and federal tax ID number
- ◊ Blank, voided check or deposit slip (to set up direct deposit of your refunds)
- ◊ 1099 forms for other income, including unemployment
- ◊ Supplemental Security Income (SSI) letter
- ◊ Copy of your last year’s tax return (if available)
- ◊ Last year’s heating bills ((11/2015 -2/2016)
- ◊ Any other tax-related letters or documents

myfreetaxes.com
PREPARE YOUR OWN TAXES ONLINE FOR FREE

Financial Empowerment Coaching

United Way

United Way of Washtenaw County

Financial Empowerment Coaching Corps Goals

To provide financial coaching to individuals/families in order to increase their financial stability by:

- ✓ Providing a financial health assessment.
- ✓ Exploring, setting, and attaining financial goals.
- ✓ Financial education and empowerment.

What Can We Help With?

- Financial goal setting
- Managing income
- Reducing debt
- Credit repair
- Establishing safe, positive banking

- Marshall Averill – Financial Coaching and Empowerment
  - maverill@uwwashtenaw.org
  - 734-677-7205
- Brad Swartz – VITA and MyFreeTaxes.com
  - bswartz@uwwashtenaw.org
  - 734-677-7206
- All information available at UWGIVE.ORG

Questions?