



IRS Certified Volunteers Providing

FREE TAX PREPARATION

IRS VITA/TCE return preparation sites are operated by certified volunteers. Site operating hours and services offered may be limited. In addition, by law, some sites provide priority services to seniors. Please be advised that you may not be immediately served. Your patience and understanding are appreciated.

Will Prepare*

- Wages, salaries, tips, etc. (Form W-2)
- Interest and dividends (Forms 1099-INT, 1099-DIV)
- Retirement income (Forms 1099-R, Form SSA-1099, RRB-1099, RRB-1099-R, CSA-1099)
- Capital gain/loss (Form 1099-B), *limited Schedule D*
- State tax refunds and unemployment benefits (Form 1099-G)
- Self-employed income (Forms 1099-NEC, 1099-K), *limited Schedule C*
- Gambling winnings (Form W-2G)
- Cancellation of debt (Form 1099-C), *limited*
- Health savings accounts (Form 1099-SA), *limited*
- Adjustments to income and itemized deductions, *limited*
- Education credits (Form 1098-T)
- Premium tax credit (Form 1095-A)
- Child tax credit, earned income credit, and other miscellaneous credits
- Application for individual taxpayer identification number (ITIN) (Form W-7)
- Sale of Home (Form 1099-S), *limited*
- Prior Year and Amended Returns, *limited*
- Foreign students and scholars, *limited (select sites only)*

Will Not Prepare*

- Schedule C with net loss, depreciation or business use of home
- Complex Schedule D, Capital Gains and Losses
- Forms 8615, 8814 (*children's unearned income*)
- Form SS-8 (*determination of worker status for purposes of federal employment taxes and income tax withholding*)
- Parts 4 & 5 of Form 8962 (*Allocation of Policy Amounts, Alternative Calculation for Year of Marriage*)
- Returns with casualty/disaster losses

*See a volunteer for other items not listed



Please see a professional preparer for assistance with complicated returns.

What to Bring

- For married filing jointly, both spouses must be present
- Original photo identification such as driver's license, school, employer, military, or state ID for you and your spouse (*if married*)
- 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 tax return
- All Forms W-2 and 1099
- Form 1095-A, if applicable
- Information for other income
- Information for all deductions and credits
- Total paid to daycare provider and their tax ID number
- For direct deposit of refund, proof of account and bank's routing number
- For prior year returns, copies of income transcripts from IRS (*and state, if applicable*)



Scan this code with your smart device or visit www.irs.gov/vita to learn more about free tax return preparation.

Site Name:

United Way of Northern Santa Barbara County

Location:

Allan Hancock College Community Education Bldg S

Days:

Saturdays 9AM - 2 PM February 8 - April 5

Hours:

Make Your Appointment at www.MyFreeTaxes.org



IRS e-file is fast, more accurate, secure, and simple.

Intake/Interview and Quality Review Sheet

You will need:

- Tax Information such as Forms W-2, 1099, 1095.
 - Social Security cards or ITIN letters for all persons on your tax return
 - Picture ID (such as valid driver's license) for you and your spouse
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- You are responsible for the information on your return. Provide complete and accurate information.
 - If you have questions, ask the IRS-certified volunteer preparer.

Volunteers are trained to provide high quality service and uphold the highest ethical standards. To report unethical behavior to the IRS, email us at ts.voltax@irs.gov

Your first name (*pronouns, optional*)M.I.Last nameYour date of birthYour job title
Spouse's first name (*pronouns, optional*)M.I.Last nameSpouse's date of birthSpouse's job title

Mailing addressApt #CityStateZIP code
Your telephone numberSpouse's telephone numberEmail address (*optional*)Did you live or work in two or more states in 2024
☐ Yes☐ No
Check if you or your spouse were in 2024:
A U.S. citizen☐ You☐ SpouseLegally blind☐ You☐ SpouseNoNo
In the U.S. on a visa☐ You☐ SpouseTotally and permanently disabled☐ You☐ SpouseNoNo
A full-time student☐ You☐ SpouseIssued an identity protection PIN (IPPIN)☐ You☐ SpouseNoNo
If due a refund, how would you like your refund☐ Direct deposit☐ Check by mailIf you have a balance due, how would you like to make your payment☐ Bank accountIRS.gov Direct Pay
☐ Split refund between accounts☐ OtherSet up installment agreementMail payment to IRS
Would you like to receive written communications from the IRS in a language other than English☐ Yes☐ SpouseNo
What language_____
Would you like information on how to vote and/or how to register to vote☐ Yes☐ No
Would you, or your spouse if married filing jointly, like \$3 to go to the Presidential Election Campaign Fund☐ Yes☐ SpouseNo
As of December 31, 2024, what was your marital status
☒ Never MarriedIf married, were you married for all of 2024☐ Yes☐ No
☐ DivorcedDid you live with your spouse during any part of the last six months of 2024☐ Yes☐ No
☐ Legally Separated but not DivorcedWidowedYear of spouse's death _____
Date of final decree_____To be completed by certified volunteer:
Can anyone else claim the taxpayer or spouse on their tax return☐ Yes☐ No
List the names below of everyone who lived with you last year (except your spouse) AND anyone you supported but did not live with you last year.

Name (first, last)	Date of birth (mm/dd/yyyy)	Relationship to you (child, parent, none, etc.)	Number of months lived in your home in 2024	Single or Married as of 12/31/2024 (SIM)	U.S. Citizen	Resident of U.S., Canada or Mexico	Full-time student	Totally and permanently disabled	Issued IPPIN	Qualifying child or relative of any other person	This person provided more than 50% of their own support	This person had less than \$5,050 of income	Taxpayer(s) provided more than 50% of support for this person	Taxpayer(s) paid more than half the cost of maintaining a home for this person
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To be completed by certified volunteer (Yes, No, or N/A)

Income: Answer the following questions on the left side of this page. Check only the boxes that apply to you and/or your spouse.

Received money from any of the following in 2024: (To be completed by certified volunteer) Income to be included Notes/Comments

☐ (B) Wages as a part-time or full-time employee	☐ (B) W-2s	#	
How many jobs _____			
☐ (B/A) Tips	☐ (B/A) Tips (Basic when reported on W2)		
☐ (B/A) Retirement account, pension or annuity proceeds	☐ (B/A) 1099-R (Basic when taxable amount is reported)	#	
☐ (B) Disability benefits (such as payments from insurance and worker's compensation)	☐ (A) Qualified Charitable Distribution From 1099-R	\$	
☐ (B) Social Security or Railroad Retirement Benefits	☐ (B) Disability benefits on 1099-R or W-2	#	
☐ (B) Unemployment benefits	☐ (B) SSA-1099, RRB-1099	#	
☐ (B) Refund of state or local income tax	☐ (B) 1099-G	#	
☐ (B) Refund of state or local income tax	☐ (B) Refund	\$	
☐ (B) Interest or dividends (bank account, bonds, etc.)	☐ (B) Itemized last year	☐ Yes ☐ No	
☐ (A) Sale of stocks, bonds or real estate	☐ (B) 1099-INT # _____	☐ (B) 1099-DIV	#
Did you report a loss on last year's return	☐ (A) 1099-B (include brokerage statement)	#	
☐ (B) Alimony	☐ Capital loss carryover	☐ Yes ☐ No	
	☐ (B) Alimony	\$	
	Excluded from income	☐ Yes ☐ No	
☐ (A/M) Income from renting out your house or a room in your house	☐ (A/M) Rental income (Advanced when the dwelling is a personal residence and rented for fewer than 15 days)		
If yes, did you use the dwelling unit as a personal residence and rent it for fewer than 15 days	☐ Yes ☐ No	Rental expense	\$
☐ Income from renting personal property such as a vehicle			
☐ (B) Gambling winnings, including lottery	☐ (B) W-2G or other gambling winnings (list losses below if taxpayer can itemize deductions)	#	
☐ (A) Payments for contract or self-employment work	☐ (A) Schedule C		
Did you report a loss on last year's return	☐ Yes ☐ No	1099-MISC	#
		1099-NEC	#
		1099-K	#
	☐ Other income reported elsewhere		
	☐ Schedule C expenses	\$	
☐ Any other money received during the year? (example: cash payments, jury duty, awards, digital assets, royalties, union strike benefits)	☐ Other income (see Pub 4012 for guidance on other income, i.e., scope of service chart)		

Expenses and Tax Related Events: Answer the questions on the left side of this page. Check only the boxes that apply to you and/or your spouse.			
Paid any of the following expenses to itemize in 2024?	(To be completed by certified volunteer) Standard or Itemized Deductions	Notes/Comments	
☐ (A) Mortgage Interest	☐ (A) 1098		# _____
☐ (A) Taxes: state, local, real estate, sales, etc.			
☐ (A) Medical, dental, prescription expenses	☐ (B) Standard deduction ☐ (A) Itemized deduction		
☐ (A) Charitable contributions			
Paid any of these expenses in 2024?	(To be completed by certified volunteer) Expenses to report	Notes/Comments	
☐ (B) Student loan interest	☐ (B) 1098-E		
☐ (B) Child and dependent care	☐ (B) Child and dependent care credit		
☐ (B/A) Contributions to a retirement account	☐ (B/A) IRA (Basic if a Roth IRA or 401K)		
☐ (B) School supplies by a teacher, teacher's aide or other educator	☐ (B) Educator expenses deduction		\$ _____
☐ (B) Alimony payments (do not include child support)	☐ (B) Alimony payments with spouse's SSN		\$ _____
	Adjustment to income ☐ Yes ☐ No		
Did any of the following happen during 2024?	(To be completed by certified volunteer) Information to report	Notes/Comments	
☐ (B) You or someone in your family took educational classes (technical school, college, job related, etc.)	☐ (B) Taxable scholarship income		
	☐ (B) 1098-T (itemized statement from school, invoice, etc.)		
	☐ (B) Education credit or tuition and fees deduction		
☐ (A) Sell a home	☐ (A) Sale of home (1099-S)		
☐ (A) Have a health savings account (HSA)	☐ HSA contributions ☐ HSA distributions		
☐ (A) Purchase health insurance through the Marketplace (Exchange)	☐ (A) 1095-A		
☐ (A) Purchase and install energy-efficient home items (example: windows, furnace, insulation, etc.)	☐ (B) Energy efficient home improvement credit		
☐ (A) Have credit card, mortgage, or other debt cancelled/forgiven by a lender	☐ (A) 1099-C		
☐ (A) Have a loss related to a declared Federal disaster area	☐ (A) 1099-A		
	☐ Disaster relief impacts return		
☐ (B) Have a tax credit disallowed (example: earned income credit, child tax credit, or American opportunity credit)	☐ (B) EITC, CTC, AOTC or HOH disallowed in a previous year		Reason _____
	Year disallowed _____		
☐ Receive any letter or bill from the IRS	☐ Eligible for Low Income Taxpayer Clinic referral		
☐ (B) Make estimated tax payments or apply last year's refund to 2024 taxes	☐ Estimated tax payments		
	☐ Last year's refund applied to this year		
	☐ Last year's return available		

Optional Information

The following information is for statistical purposes only. Your responses to these questions are not a part of your tax return and are not transmitted to the IRS with your tax return. You are not required to answer these questions.

1. Would you say you can carry on a conversation in English	☐ Very well	☐ Well	☐ Not well	☐ Not at all	☐ Prefer not to answer
2. Would you say you can read a newspaper in English	☐ Very well	☐ Well	☐ Not well	☐ Not at all	☐ Prefer not to answer
3. Do you or any member of your household have a disability	☐ Yes	☐ No	☐ Prefer not to answer		
4. Are you or your spouse a Veteran of the U.S. Armed Forces	☐ Yes	☐ No	☐ Prefer not to answer		
5. What is your race and/or ethnicity? <u>Select all that apply</u>					
☐ American Indian or Alaska Native (for example, Navajo Nation, Blackfeet Tribe of the Blackfeet Indian Reservation of Montana, Native Village of Barrow Inupiat Traditional Government, Nome Eskimo Community, Aztec, Maya, etc.)	☐ American Indian or Alaska Native (for example, Navajo Nation, Blackfeet Tribe of the Blackfeet Indian Reservation of Montana, Native Village of Barrow Inupiat Traditional Government, Nome Eskimo Community, Aztec, Maya, etc.)				
☐ Asian (for example, Chinese, Asian Indian, Filipino, Vietnamese, Korean, Japanese, etc.)	☐ Asian (for example, Chinese, Asian Indian, Filipino, Vietnamese, Korean, Japanese, etc.)				
☐ Black or African American (for example, African American, Jamaican, Haitian, Nigerian, Ethiopian, Somali, etc.)	☐ Black or African American (for example, African American, Jamaican, Haitian, Nigerian, Ethiopian, Somali, etc.)				
☐ Hispanic or Latino (for example, Mexican, Puerto Rican, Salvadoran, Cuban, Dominican, Guatemalan, etc.)	☐ Hispanic or Latino (for example, Mexican, Puerto Rican, Salvadoran, Cuban, Dominican, Guatemalan, etc.)				
☐ Middle Eastern or North African (for example, Lebanese, Iranian, Egyptian, Syrian, Iraqi, Israeli, etc.)	☐ Middle Eastern or North African (for example, Lebanese, Iranian, Egyptian, Syrian, Iraqi, Israeli, etc.)				
☐ Native Hawaiian or Pacific Islander (for example, Native Hawaiian, Samoan, Chamorro, Tongan, Fijian, Marshallese, etc.)	☐ Native Hawaiian or Pacific Islander (for example, Native Hawaiian, Samoan, Chamorro, Tongan, Fijian, Marshallese, etc.)				
☐ White (for example, English, German, Irish, Italian, Polish, Scottish, etc.)	☐ White (for example, English, German, Irish, Italian, Polish, Scottish, etc.)				

Privacy Act and Paperwork Reduction Act Notice

We are asking for this information so you may participate in the IRS Volunteer Income Tax Assistance (VITA) and Tax Counseling for the Elderly (TCE) program which provides IRS-certified volunteer income tax preparers to assist with basic income tax return preparation for qualified individuals. The IRS authority to collect this information is 5 U.S.C. section 301 and 26 U.S.C. section 7801. The information you provide may be disclosed to others who coordinate VITA/TCE staffing, outreach, and other VITA/TCE related activities. The IRS may only disclose your return and return information as provided by 26 U.S.C. section 6103. All other records may be disclosed only for purposes the IRS deems are compatible with the purpose for which IRS collected the records, and consistent with any routine use disclosures described in the System of Record Notice (SORN) Treasury/IRS 24-030, Customer Account Data Engine (CADE) Individual Master File (IMF). You may view Treasury/IRS SORNs on the Treasury SORN website at Treasury.gov/System of Records Notices (SORNs). Providing this information is voluntary however, if you do not provide the requested information the IRS volunteers may not be able to assist you with preparing and filing your tax return.

The Paperwork Reduction Act requires that the IRS display an OMB control number on all public information requests. The OMB Control Number for this study is 1545-1964. Also, if you have any comments regarding the time estimates associated with this study or suggestion on making this process simpler, please write to the Internal Revenue Service, Tax Products Coordinating Committee, SE:TS:CAR:MP:T:T:SP, 1111 Constitution Ave. NW, Washington, DC 20224.

This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There is no handwriting or other markings on the paper.

Consent to Disclose Tax Return Information to VITA/TCE Tax Preparation Sites

Federal Disclosure:

Federal law requires this consent form be provided to you. Unless authorized by law, we cannot disclose your tax return information to third parties for purposes other than the preparation and filing of your tax return without your consent. If you consent to the disclosure of your tax return information, Federal law may not protect your tax return information from further use or distribution.

You are not required to complete this form to engage our tax return preparation services. If we obtain your signature on this form by conditioning our tax return preparation services on your consent, your consent will not be valid. If you agree to the disclosure of your tax return information, your consent is valid for the amount of time that you specify. If you do not specify the duration of your consent, your consent is valid for one year from the date of signature.

Terms:

Global Carry Forward of data allows TaxSlayer LLC, the provider of the VITA/TCE tax software, to make your tax return information available to ANY volunteer site participating in the IRS's VITA/TCE program that you select to prepare a tax return in the next filing season. This means you will be able to visit any volunteer site using TaxSlayer next year and have your tax return populate with your current year data, regardless of where you filed your tax return this year. This consent is valid through November 30, 2026.

The tax return information that will be disclosed includes, but is not limited to, demographic, financial and other personally identifiable information, about you, your tax return and your sources of income, which was input into the tax preparation software for the purpose of preparing your tax return. This information includes your name, address, date of birth, phone number, SSN, filing status, occupation, employer's name and address, and the amounts and sources of income, deductions and credits that were claimed on, or contained within, your tax return. The tax return information that will be disclosed also includes the name, SSN, date of birth, and relationship of any dependents that were claimed on your tax return.

You do not need to provide consent for the VITA/TCE partner preparing your tax return this year. Global Carry Forward will assist you only if you visit a different VITA or TCE partner next year that uses TaxSlayer. You have the right to receive a signed copy of this form.

Limitation on the Duration of Consent: I/we, the taxpayer, do not wish to limit the duration of the consent of the disclosure of tax return information to a date earlier than presented above (November 30, 2026). If I/we wish to limit the duration of the consent of the disclosure to an earlier date, I/we will deny consent.

Limitation on the Scope of Disclosure: I/we, the taxpayer, do not wish to limit the scope of the disclosure of tax return information further than presented above. If I/we wish to limit the scope of the disclosure of tax return information further than presented above, I/we will deny consent.

Consent:

I/we, the taxpayer, have read the above information.

I/we hereby consent to the disclosure of tax return information described in the Global Carry Forward terms above and allow the tax return preparer to enter a PIN in the tax preparation software on my behalf to verify that I/we consent to the terms of this disclosure.

Primary taxpayer printed name and signature	Date
Secondary taxpayer printed name and signature	Date

If you believe your tax return information has been disclosed or used improperly in a manner unauthorized by law or without your permission, you may contact the Treasury Inspector General for Tax Administration (TIGTA) by telephone at 1-800-366-4484. Report a Crime or IRS Employee Misconduct - U.S. Treasury Inspector General for Tax Administration (TIGTA) (<https://www.tigta.gov/reportcrime-misconduct>).