



## FREE TAX SERVICE FOR LOW-MODERATE INCOME INDIVIDUALS & FAMILIES

### Volunteer Income Tax Assistance

**NEW LOCATION:**

Winona Mall – in main mall  
1213 Gilmore Ave  
Winona, MN

**Phone:**  
**507-474-7202**

Appointments can be  
made **Monday-Friday**  
**afternoons only** starting  
January 25, 2019

**Dates:**  
February 2<sup>rd</sup> – April 13th

**Hours:**  
Monday and Tuesday  
12:00-2:30 & 4:00-6:30 PM  
Wednesday  
12:00 – 2:30 PM  
Saturday 9:00-11:30 AM

**Walk-Ins:**  
Welcome and handled as  
time allows

The Volunteer Income Tax Assistance Program (VITA) is sponsored by the IRS and Minnesota Department of Revenue. Income limit will be enforced.

**VITA INCOME LIMIT** (Adjusted Gross Income plus untaxed investment income)

<b>Dependents (student working but a dependent for parents)</b>	<b>\$25,000</b>
<b>Single (no dependents)</b>	<b>\$35,000</b>
<b>Family size 2 (married couple or single with one dependent)</b>	<b>\$45,000</b>
<b>Family size 3 or more</b>	<b>\$55,000</b>

*To find out if you are eligible for the free tax service, look at your 2018 tax returns and find the 1040 IRS form. At the bottom of the first page is your adjusted gross income. If it falls within the guidelines above and your income has not significantly increased, you are eligible to have your taxes done free at our tax site.*

**Bring the following forms with you to your appointment. Have your W-2 forms, 1099 and social security forms out of the envelopes and grouped together.**

- ✓ Driver's license or other form of picture ID
- ✓ Social security card (s) for each member of your family (NEW MEDICARE CARDS NO LONGER ACCEPTED)
- ✓ Last year's tax forms are very helpful to be sure we report everything.
- ✓ If you receive SSI or other assistance be sure to bring evidence of what you received in 2018
- ✓ W-2 forms from every employer you worked for in 2018
- ✓ Unemployment compensation statements for 2018
- ✓ Social security report is **mailed to you in January 2019** (has a pink box with income for 2018 in the box)
- ✓ Interest statements from your banks or other sources of interest or dividends
- ✓ Dependent care provider information if you use day care etc. for children or older adults
- ✓ All of your 1099 R forms from pensions, 1099B for investments, and any other 2018 income sources. If your brokerage statement has more than 6 buy/sell transactions on it we will **not** be able to help you
- ✓ Form 1095 – Healthcare Coverage
- ✓ If you plan to itemize your deductions, organize them on a piece of paper and add them up
- ✓ If you have a small business, you must have less than \$5,000 in expenses. You cannot have any inventory or depreciation. Be sure you bring evidence of income/expenses involved with the business
- ✓ Tuition forms supplied by your college must be able to support expenses against scholarships
- ✓ Any receipts for purchases of school supplies that may be deducted on state taxes
- ✓ If contributions are over \$500, even if you do not itemize, you can deduct ½ of the amount over \$500 from your state taxes. Be sure you have documentation if you are audited
- ✓ If you are a renter (apartment, house or mobile home) you will need the CRP from your landlord for the year 2018. If you live in a **mobile home that you own**, you **CANNOT** file for property tax refund **until your property tax bill arrives in July**
- ✓ **Home owners cannot file for property tax refund until late March when your property tax bill arrives**

Services are made available through a grant provided by the State of Minnesota.