



DON'T PAY TO FILE YOUR TAXES

WNY Regional VITA Network and United Way of Buffalo & Erie County

Our nation's tax season will start on Monday, January 29, 2024 to begin accepting and processing 2023 tax year returns. You may qualify for one of the following options offered by the WNY Regional VITA Network partner organizations. If you earned \$64,000 or less in adjusted gross income, you can get your federal and state taxes e-filed for free*, and you may qualify for the Earned Income Tax Credit (EITC).

*IRS e-file is fast, more accurate, secure and simple. While most returns can be processed, some may be more complex and need referral to a more specialized preparer.


FILE YOUR TAXES ONE OF TWO WAYS:

1 VOLUNTEER INCOME TAX ASSISTANCE (VITA) SITES

Free, supported tax preparation services for anyone who earns less than \$64,000. Volunteer tax preparers are fully trained and IRS certified to complete and e-file your return at no charge. Call 211 to make an appointment and find a free tax preparation site near you (dial 211 or 1-888-696-9211).

2 ONLINE: MYFREETAXES®

MyFreeTaxes® is a service offered by United Way for free tax preparation for people at all income levels who have a simple return. You can file your taxes completely online from the comfort of your home. Visit myfreetaxes.com to get started.



OR USE ONE OF THESE OPTIONS FROM THE FOLLOWING TRUSTED ORGANIZATIONS:

IRS FREE FILE

IRS Free File Guided Tax Software, available only at [IRS.gov](https://www.irs.gov), is available to any taxpayer or family with Adjusted Gross Income of \$79,000 or less in 2023. Visit [irs.gov](https://www.irs.gov) to get started.

AARP TAX-AIDE

AARP Foundation Tax-Aide provides in-person and virtual tax assistance to anyone, free of charge, with a focus on taxpayers who are over 50 and have low to moderate income. Tax-Aide volunteers are located nationwide, and are trained and IRS-certified every year to make sure they know about and understand the latest changes and additions to the tax code. Visit aarp.org/aarp-foundation to get started.

MILTAX

MilTax generally offers free return preparation and electronic filing software for federal income tax returns and up to three state income tax returns for all military members, and some veterans, with no income limit. Visit militaryonesource.mil to get started.

WHAT DO I NEED TO BRING WITH ME?

1 SOCIAL SECURITY CARDS

- Social security cards or Individual Taxpayer Identification notices/cards for you, your spouse and/or dependents



2 IDENTIFICATION

- Picture ID, such as a valid driver's license or other government issued ID, for you and your spouse, if applicable
- If you are married filing jointly, both spouses must be present
- An Individual Taxpayer Identification Number (ITIN) assignment letter may be substituted for you, your spouse and your dependents if you do not have a Social Security number
- Wage and earning statements (Form W-2, W-2G, 1099-R, 1099-MISC) from all jobs held during the tax year
- Interest and dividend statements from banks (Forms 1099)



3 HEALTH INSURANCE STATEMENTS

- Affordable Health Care Statements 1095-A, B or C
- Health Insurance Exemption Certificate, if received (Form 8965)



4 EDUCATION CREDITS & ADJUSTMENTS

- If you, your spouse or a child attended college—tuition expense statement (1098-T) and/or student loan interest



5 CHILD CREDITS

- Total paid for child care/day care expenses: provider name, address, tax ID# (SS# or business EIN)
- Documentation of court-ordered child support



6 ITEMIZED DEDUCTIONS

- Medical bills paid
- Charitable contributions made during the year
- Itemized business expenses



7 PROPERTY TAXES

- Home interest and property taxes paid
- Rental information for NYS credit



8 ADDITIONAL ITEMS

- Birth dates of you, your spouse and/or dependents on return
- Proof of account routing and account numbers for direct deposit such as a blank check
- A copy of last year's tax return



For more information and to find the tax site closest to you, contact 211 using one of the three ways below.



DIAL 211 OR 888-696-9211



TEXT YOUR ZIP CODE TO 898-211



VISIT 211WNY.ORG