

DO YOU STILL NEED HELP FILING YOUR TAXES?



Free tax preparation is available for **years 2001-2023** at
Mesa United Way – schedule an appointment at

<https://muw-vita-site.bookafy.com/>

OR email to vita@azuracares.org OR call 480-834-2122

Walk-ins allowed as time permits – reservations will have priority

Tuesdays and Thursdays 1 – 7 PM 6/4 – 10/24, 2024

WHAT TO BRING:

- **Social Security Cards** (or ITIN cards or ITIN letters) for all members of the household
- **Picture Identification** for taxpayer (and spouse, where applicable)
- **Proof of all income** including W-2 and 1099 forms, and self-employment records
- **Social Security and Pensions statements** – Form SSA-1099 and 1099-R
- **Interest, Dividend, and Stock Transactions** – Form 1099-INT / -DIV / -B
- **Contributions** to non-profit organizations, churches, and schools including AZ credits
- **Child Care Information** - record of payment with provider's name, address, and tax ID#
- **Child Tax Credit Payments** - IRS Letter 6419 reports payments received during 2021
- **Stimulus Payments for 2020 and 2021** – Notice 1444 /-b /-c or IRS Letter 6475
- **Advanced Child Tax Credit Payments for 2021** – IRS Letter 6419
- **Direct Deposit Information** including bank name, routing and account numbers
- **Education Information** including 1099-T and expenses – books and fees
- **Health Insurance Info** - Form 1095-A if you purchased insurance from the marketplace
- **Prior year tax returns** if available (federal and state) – not required... but may be useful
- Any letters received from the IRS or state department of revenue
- If filing a joint return, both spouses must be present to sign the returns

WHERE TO GO: Mesa United Way Building

137 E University Dr, Mesa AZ 85201
South side of street between Center St and Mesa Dr

RESTRICTIONS APPLY:

- **Income must be less than \$64K for the 2023 tax year**
- **No Rental or Farm Income** – schedules E or F
- **Business Income** – sched C limits (max \$35K expenses, no losses, no business use of home)
- **Married Filing Separately** – filing status allowed only if separated from spouse all year



www.Azuracares.org/VITA



Mesa United Way

How To Get Prior Year Tax Returns Completed

Step 1. Collect your tax information. This includes income (W2, 1099, W2G, etc.) and deductions/credits and other documents/information. Please the other side of this flyer for more details.

If you do not have ALL of your tax documentation then you have three choices...

- a) go to irs.gov and enter “transcripts” in the search box - create a login account and then print out the documents that you need (see Step 2 below),
- b) walk in to an IRS office (or make an appointment at 844-545-5640). The Mesa IRS office is located at **(A) 1818 E. Southern Ave. Mesa, AZ** (see map below)
- c) fax Form 4506-T (<https://www.irs.gov/pub/irs-pdf/f4506t.pdf>) to the IRS - option 8 for W2 etc.

Step 2. If you did not file your return AND do not have all of your tax documents ask the IRS for a **“Wage and Income Transcript”** (option 8 on Form 4506-T) for each year that you need to file (e.g. 2021, 2022, and 2023). If you **already filed your return** and need to do an amendment, but do not have a copy of your original return, then **also** ask for a **“Tax Return Transcript”** (option 6a on Form 4506-T). An **“Account Transcript”** (option 6b on Form 4506-T) will give you a listing of all payments/credits/charges for the tax year.

Step 3. Call Mesa United Way at (480) 834-2122 to **make an appointment**. Be sure you have a **Social Security Card** (for all members of the family), **picture ID**, and **all relevant tax documents** ready to bring to your appointment.

Step 4. Come to the Mesa United Way building located at **(B) 137 E. University Drive, Mesa, AZ 85201** (The building is on the south side of University between Center Street and Mesa Drive).

