

DO YOU STILL NEED HELP FILING YOUR TAXES?



Free tax preparation is available for **years 2001-2022** at Mesa United Way - **by appointment only** – schedule an appointment at

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

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

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
- **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: BY APPOINTMENT ONLY

Mesa United Way Building, 137 E University Drive, Mesa AZ 85201
(south side of street between Center Street and Mesa Drive)

RESTRICTIONS APPLY:

- **Income must be less than \$64K for the 2023 tax year**
- **No Rental or Farm Income** – schedules E or F
- **Business Income** – schedule 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



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...

- 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),
- make an appointment with an IRS office by calling 844-545-5640. The Mesa IRS office is located at **(A) 1818 E. Southern Ave. Mesa, AZ** (see map below)
- 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. 2020, 2021, and 2022). 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).

