

# Bethpage VITA Services.



*February 2<sup>nd</sup> – April 12<sup>th</sup>, 2024*

The **Volunteer Income Tax Assistance (VITA)** program offers free tax help for low to moderate income (generally \$65,000 and below) individuals and families. Bilingual assistance in English/Spanish is available by appointment only. Please see below for appointment details. Services are subject to availability.

## IN-PERSON SERVICES

**Bethpage VITA representatives will be on site for in-person services:**

Company Name: Parent Resource Center

Date: Fridays, Feb 2<sup>nd</sup> & Feb 16<sup>th</sup> / March 1<sup>st</sup>, 15<sup>th</sup>, & 29<sup>th</sup> / April 12<sup>th</sup> 2024

Time: 10:00 am – 4:00 pm

Location: 380 Jackson St, Hempstead NY 11550

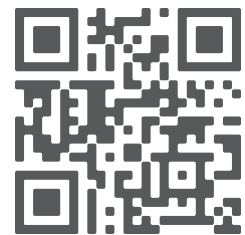
Contact: (516) 349-4288 / [community@bethpagefcu.com](mailto:community@bethpagefcu.com)



## VIRTUAL VITA SERVICES

**Get scheduled for Virtual Appointments!**

1. Upload your tax documents to secure online platform
2. Must have access to a smart phone or webcam for video appointments
3. Appointments available on Tuesdays, Wednesdays & Thursdays
4. Scan the QR code to be scheduled for an appointment

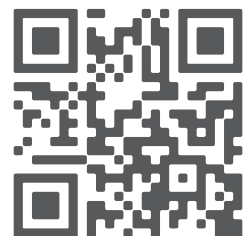


**Scan for Virtual VITA**

## FACILITATED SELF ASSISTANCE

**Use our software for free!**

1. If you earned \$79,000 or less you qualify!
2. Safe and secure online tax software
3. Use your own laptop, desktop, smartphone or tablet with webcam or camera
4. Only basic computer skills and active email account required



**Scan for FSA**

# 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. Please be advised that you may not be immediately served. Your patience and understanding are appreciated.

## Bethpage VITA sites will prepare:

- **Acceptable forms:**  
*W2, 1099-Int, 1099-Div, 1099-G, SSA-1099, W2-G, 1098-T, 1095-B or 1095-C, 1099-R* (only if taxable amount determined on Box 2a)
  - **Types of Income:**  
*Wages, salaries, etc.* (Form W-2)  
*Interest Income* (Form 1099-INT),  
*Dividends Received* (Form 1099-DIV),  
*State Tax Refunds* (Form 1099-G),  
*Unemployment Benefits* (Form 1099-G),  
*Gambling Winnings* (Form W-2G)
  - **Certain Tax Credits:**  
*Child Tax Credit,*  
*Earned Income Credit,*  
*Education Credits* (Form 1098-T),
  - **Limited Types of Income:**  
*IRA Distributions* (Form 1099-R) *limited*  
*Pension Income* (Form 1099-R) *limited*  
*Social Security Benefits* (Form SSA-1099) *limited*
  - Current year tax returns only,
  - Basic tax returns only,
  - Standard deductions only,
  - Only Federal and New York State Tax Returns
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## Bethpage VITA sites will not prepare:

- No outside of NY income
  - Certain Pension & Retirement Income without taxable amounts determined on Box 2a (1099-R, RRB-1099, CSA-1099)
  - Certain Social Security Benefits (Form RRB-1099)
  - Self-Employment Income: Cash Based, Uber/Lyft, Ride Share, Food delivery services, etc (1099-Misc, 1099-NEC, 1099-K)
  - Sale of Home (Form 1099-S)
  - Schedule A "Itemized Deductions": 1098 Mortgage Interest, Real Estate Taxes, Personal Property Taxes, Medical & Dental expenses
  - Cancellation of Debt (Form 1099-C)
  - Schedule C with loss, depreciation or business use of home
  - Schedule D "Capital Gains and Losses":  
Crypto, E-Currency, Investments, Sale of Stocks (1099B)
  - Credits for Sick Leave and Family Leave for Certain Self-Employed Individuals (Form 7202)
  - Form SS-5 (request for Social Security Number)
  - Form 8814 (child taxed at parent's tax rate)
  - Form 8606 (non-deductible IRA)
  - Form SS-8 (determination of worker status for purposes of federal employment taxes and income tax withholding)
  - Marketplace Health Insurance (Form 1095-A)
  - Parts 4&5 of Form 8962 (Premium Tax Credits)
  - Form W-7 application for Individual Taxpayer Identification Number (ITIN)
  - Returns with casualty/disaster losses
  - Prior year and amended tax returns
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## Please remember to have the following:

- Photo identification for you and your spouse (if filing joint return)
- Social Security cards or Individual Taxpayer Identification Number documents for you, your spouse, and all dependents
- Birth dates for you, your spouse, and all dependents
- A copy of last year's tax return (for reference)
- Proof of income (Forms W-2, 1098, and 1099)
- Information for other income
- Proof of Health Insurance (Form 1095-B or 1095-C)
- Information for all deductions/credits
- Total paid to day care provider, their name, address and tax ID number
- For direct deposit of refund: proof of account number and routing number
- For married filing joint returns, both spouses must be present at appointments.

For more information, visit [lovebethpage.com/vita](https://lovebethpage.com/vita), call (516) 349-4288 or email us at [community@bethpagefcu.com](mailto:community@bethpagefcu.com).