VITA

VOLUNTEER INCOME TAX ASSISTANCE PROGRAM

Sponsored by the Retired and Senior Volunteer Program

February 1, 2017 – April 18, 2017

Contact: Valerie Smith (910)798-6406

Location # 1

New Hanover County Senior Resource Center

2222 SOUTH COLLEGE ROAD
WILMINGTON, NC 28403
HOURS

Monday-Wednesday-Friday: 9:00 a.m. to 4:00 p.m. No returns started after 4:00 pm.
Tuesday & Thursday: 11:00 a.m. to 6:00 p.m. No returns started after 6:00 pm.

To reduce waiting time for all days, sign-up for blocks of time beginning at 8:00. You can leave and return 20 minutes before your assigned block of time to complete the required paperwork. If you return past the time you signed-up for you will be placed at the end of the list.

Beginning Wednesday February 1, 2017

Location # 2

New Hanover County Main Library

AARP Tax Aide
201 CHESTNUT STREET
WILMINGTON, NC 28401
HOURS:
Monday thru Friday: 9:30 a.m. to 1:30 p.m.

Beginning Wednesday, February 1, 2017

Location # 3

Town of Carolina Beach

****New Location Old Library****
300 CAPE FEAR BLVD.
CAROLINA BEACH, NC 28428
HOURS:
Monday thru Thursday 12:00 – 4:00 p.m.
Friday: Closed
Saturday: 8:00 a.m. – 12:00

Beginning Wednesday, February 1, 2017

Tax Preparer's do not have access to a phone.

PLEASE BRING ITEMS LISTED ON THE BACK OF THIS PAPER

What to Bring!

1. Picture ID, address and local phone number.
2. Social Security card and Date of Birth for self, spouse and all dependents.
3. Wage statements (W-2's and 1099's) from all employers.
4. Pension, Social Security, and/or Railroad Retirement statements.
5. Interest, dividend, and Brokerage statements.
6. For returns with itemized deductions:
   Out of pocket costs for health insurance and medical expenses
   Home mortgage interest and real estate property taxes paid in 2016
   Charitable contributions
7. Your 2015 tax return. Bringing it may save you money and time.
8. Any other tax documents related to 2016.
9. Checking Account routing and account numbers for direct deposit.
10. All ACA (Obamacare) statements (1095-A, 1095-B, 1095-C) that you received. If you purchased insurance from the Marketplace you MUST have your form 1095-A in order to do your tax return.

What We Can Do and What We Can't Do

We **CANNOT** do **past year** returns or **amended** returns until **March 1, 2017**.
Limited to 2015, 2014, and 2013 only.
We **CANNOT** do **Rental** Income.
We **CANNOT** do **Clergy** returns.
We **CANNOT** do casualty or theft losses.
We **CANNOT** do returns with inherited property/stock with the date of death in **2010**.
We **will do Self-employment**, with the following restrictions:
Sole proprietor, no employees, no inventory, standard mileage rate only, no home office deduction, and no depreciation.
Schedule C-EZ with expenses up to $5,000.00, and cannot show a loss.
Schedule C with expenses up to $25,000.00 and cannot show a loss.
We **will do SIMPLE K-1's** as follows:
K-1 shows only interest, dividends and qualified dividends, capital gains, and royalties.

We **will do North Carolina** returns. We **CANNOT** do returns for **any other states**.