



FREE TAX Preparation Service

Available to **Eligible** individuals and families whose combined household earned income was **LESS than \$64,000** in 2023.

If you worked in 2023, you may be eligible to receive the:

- ▶ California Earned Income Tax Credit, for a refund up to \$3,529
- ▶ Federal Earned Income Tax Credit, for a refund up to \$7,430

Eligibility depends on your income and family size.

FREE tax preparation services will be offered at:



**Big Bear Valley Senior Center
42651 Big Bear Blvd., Big Bear**

Date	Time
April 12	9:30 a.m. - 4 p.m.

Call to Schedule Your Appointment:
1 (877) 410-8829

**FOR ADDITIONAL LOCATIONS PLEASE CALL:
1 (877) 410-8829**

WHAT MUST I BRING TO MY TAX APPOINTMENT?

1 Identification

For all persons listed on the tax return:

- ✓ Valid **government-issued ID** or **driver's license** (no copies)
- ✓ Birthdate(s)
- ✓ **Original Social Security card(s) or Individual Tax Identification Number (ITIN) card(s) or letter(s)** (no copies)



2 Income

- ✓ W-2s for each job worked in 2023
- ✓ All 1099 forms received
- ✓ Year-end income for Social Security Insurance, workers' compensation and unemployment insurance benefits



3 Education Credits & Adjustments

- ✓ Tuition expenses for university, college or technical college (Form 1098-T)
- ✓ Interest statement for student loans (Form 1098-E)



4 Child Credits

- ✓ **Child care expenses:** Provider name, address, phone number, and Tax ID or Social Security Number



5 Property Taxes

- ✓ **Homeowner statements:** Verification of real estate taxes paid, or a property tax statement



6 Itemized Deductions

- ✓ Charitable donations
- ✓ Medical expenses
- ✓ Mortgage interest statement(s) (Form 1098)
- ✓ DMV registration statement(s)



7 Additional Documents

- ✓ Copy of **2022 tax return**
- ✓ Direct deposit information: **voided check** or bank routing and account number
- ✓ **Health insurance** documents (Form 1095 A, B or C and 3895)

OTHER IMPORTANT REQUIREMENTS

- ✓ **Both spouses** must be present to prepare and file as married filing jointly
- ✓ Taxpayers itemizing deductions must add up all expenses prior to having returns prepared

✗ We do NOT provide the following services:

- Rental Property Tax Preparation
- Out of state returns
- Married filing separately
- Military returns
- Self-employment tax preparation with business expenses

BRING ALL APPLICABLE TAX DOCUMENTS AND ORIGINAL GOVERNMENT-ISSUED IDENTIFICATION WITH YOU TO YOUR APPOINTMENT!

IRS regulations require all tax-related documents and original government-issued identification to be present at your tax preparation appointment. If any documents or verifications are missing at the time of your appointment, we will not be able to process your tax return.

Visit us at: wp.sbcounty.gov/tad/resources