Eastern Shore Area Agency on Aging

Community Action Agency

Free Income Tax Preparation

Beginning February 16th Monday-Thursday 9 a.m.-2 p.m.

\*Due to the COVID-19 Pandemic and to protect the health and safety of our volunteers and the public we will operate as an In Take Site. Taxes will not be prepared Face-to-Face.

For information or to arrange for Tax Preparation services

Please call 757-442-9652 or email: mbunting@esaaacaa.org

**What Documents will I need?**

**Personal Information (bring all documents)**

* **Valid Picture ID**
* **Taxpayer Identification Number**: Social Security Card, Social Security Number verification letter, or Individual Taxpayer Identification Number
* **2019 Tax Returns**

**Proof of Income (bring all documents that apply)**

* **W-2s** for all jobs last year
* **1099s** for any other income received last year
* **Statements for prizes, scholarships/fellowships or lottery/gambling winnings**

**Proof of Health Insurance (bring all documents that apply)**

* **1095-A** if you had coverage through the HealthCare.gov (Obamacare)
* **1095-B or 1095-C** if you had other kinds of insurance or coverage

**Additional Items (bring all documents that apply)**

* **Checking and Savings Account Information** to have your refund directly deposited to your account
* **Tax Return** from last year, if available
* **Child Care Expenses:** Provider’s address and federal tax ID number
* **Homeowners:** Mortgage statements and property tax bills
* **Education:** College tuition and student loan statements
* **Alimony:** Paid or received
* **Notices:** IRS, state tax, health insurance marketplace or anything that says “IMPORTANT TAX DOCUMENT”

**\*Under no circumstances will the Internal Revenue Service tolerate discriminatory treatment of taxpayers by its employees, or individuals who volunteer or work at Low-Income Tax Clinics, Volunteer Income Tax Assistance and Tax Counseling for the Elderly sites. No taxpayer shall be subject to discrimination based on sex in educational programs or activities, or race, color, national origin, reprisal, disability or age in programs or activities supported by the department of the Treasury Internal Revenue Service.**