

AVON LIBRARY VITA TAX RETURN PREPARATION SERVICE
Tax Returns for 2009

FAQs: Answers to Frequently Asked Questions

Q. Who is eligible for this free service?

A. The VITA service is designed for lower-income people with simple returns. In Avon this means:

1. Total income no higher than around \$60,000 per year.
2. No income from rentals, partnerships, or businesses (except simple self-employment).
3. No complex capital transactions with depreciation or amortization.
4. People who did not live or work outside of Connecticut during the year.
5. No real estate trusts.

Q. Only SIMPLE Self-employment. What is simple self-employment?

A. This is a one-person service business that is eligible for Schedule C-EZ. This means no employees, inventory, depreciation, home office expenses, or loss. Expenses must be under \$5,000. You must provide written documentation of income and expenses, or we will not do your return.

Q. When is this service provided?

A. There are usually three volunteers available on each Saturday from February 6 to April 10, and three volunteers on each Wednesday from February 3 to April 14. Appointments are 50 minutes in length and are scheduled for 10:00, 10:50, 11:40, and 12:30 on Saturdays and 1:30, 2:20, and 3:10 on Wednesdays.

Q. How do I make an appointment?

A. Call the library at (860) 673-9712 and ask for the Reference Desk.

Q. Do I have to live in Avon to get this service?

A. No.

Q. What if I don't want a return prepared but just want a question answered or my own calculations reviewed?

A. If you have a simple question that can be answered in five minutes or less, just come in during the appointment days and see if a volunteer can answer it between appointments. For more complicated questions or calculation reviews, make an appointment.

Q. When should I arrive for my appointment?

A. People with appointments at 10:00 should arrive as soon as the library opens at 10:00. People with appointments at other times should arrive 10 minutes before their appointment time in order to fill out an Intake Sheet, which will be used to prepare the return.

Q., What do I do if I can't keep my appointment?

A. Call the library and cancel it, preferably 24 hours or more before the scheduled time.

Q. What happens if I don't call to cancel and don't show up?

A. You will not be permitted to make another appointment this year.

Q. What if I am running a little late?

A. We will wait up to 10 minutes past the scheduled appointment time for you to arrive. After that time, the volunteer may take another taxpayer in your place and you will have to make a new appointment. If the volunteer is still available, he will start your return, but, if it cannot be completed before the next scheduled appointment, you will have to return another time to finish it.

Q. What if my return takes longer than 50 minutes to an hour to do?

A. Usually this is because the taxpayer has not organized his or her papers or does not have needed information readily available. You will have to return another time to finish it.

Q. Can I ask for a particular volunteer?

A. Yes, but be aware that that person may not be present on the day you want.

Q. What information do I need to bring with me?

A. You must bring ALL of the following:

1. Photo identification
2. Social security cards for everyone listed on the return
3. A copy of last year's Federal tax return
4. Copies of all W-2, 1099, and 1098 tax forms received from payers
5. Amounts of other income, such as alimony, jury duty, etc.
6. Bills or checks for property tax payments paid during 2009 to your town for a vehicle or residence . For most people who have residence property tax payments and who are itemizing deductions, this means the second payment for 2008 taxes that they paid in January and the first payment for 2009 taxes that they paid in July.
7. Amount of the Stimulus payment received during 2009.
8. For sales of property (stocks, bonds, etc.), the cost of the property and dates of purchase and sale
9. For direct deposit of the refunds, a copy of the check or deposit slip for the bank in which it will be deposited.
10. For people who paid estimated taxes during 2009, dates and amounts of the payments.
11. For people with child care expenses, the provider's identification number

Q. Will my return be electronically filed?

A. We have two computers. On Wednesdays all returns will be electronically filed. On Saturdays, when there are three appointments per hour, at each hour's appointments one taxpayer's return will be prepared by hand for paper filing - usually the simplest of the

three returns, normally those that can use form 1040-EZ

Q. What does electronic filing involve?

A. We prepare your return on the computer. After you have reviewed it on the screen, we print a copy for you and then electronically transmit the returns to both the IRS and to Connecticut. If you owe money, we provide you with a payment voucher to send in with your check (you must provide your own envelope for the Federal payment). You will sign a form 8879 that we will send to the IRS in April with copies of your W-2's, 1099's, and 1098's. If you are filing a joint return, both people must sign this form before your return can be transmitted.

Q. How will the privacy of my information be protected?

A. We comply with Federal requirements for privacy. Ask the volunteers for details.

Q. Will the volunteers be available after April 15 to help with IRS questions or other reasons?

A. No. You will need to work with the IRS directly or hire a paid preparer to help you.