



Tax information Checklist

- _____ Photo Identification (both husband and wife if filing married.)
- _____ Valid Social Security Cards for taxpayer, spouse and dependents.
- _____ Birth dates for primary, secondary and dependents on tax return.
- _____ Wage and earning statement(s) Form W-2, W-2G, 1099-R from all employers.
- _____ Interest and dividend statements from banks (form 1099).
- _____ A copy of last year's federal and state returns, if available.
- _____ Bank routing numbers and account numbers for direct deposit.
- _____ Other relevant information about income and expenses.
- _____ Total paid for day care (if applicable) and the day care provider's identifying number.
- _____ Medical Insurance form 1095-A, 1095-B or 1095-C.
- _____ Other income/expense information (e.g. Tuition Credit, Form 1098-T, Student Loan Interest form 1098-E)



AMADOR-TUOLUMNE COMMUNITY ACTION AGENCY VOLUNTEER
TAX ASSISTANCE PROGRAM 2017 TAX SEASON

To be completed before tax appointment.

ATCAA is operating a free Volunteer Income Tax Assistance (VITA) tax site in partnership with the IRS. The volunteers who will be assisting you have been trained and certified through the IRS. They are not tax advisors and are allowed to file only certain types of returns based on their training and certification. ATCAA tax volunteers and the Amador Tuolumne Community Action Agency cannot be held responsible for errors in preparation of tax forms or penalties imposed.

YOUR tax return information may be sent to another location for one or more of the following reasons; interviewing the taxpayer, preparing the tax return or performing a quality review. All information will be sent to other locations via a secure internet site. You will be required to return to our office for a review of your taxes and to sign the completed tax return.

ATCAA **does not** keep copies of your tax documents on file. All ATCAA intake forms are kept confidential. We return to you all of your original tax paperwork and tax documentation and will give you a copy of your tax return. Please retain with your home records.

ATCAA **DOES** retain in order to mail to the IRS:

- a copy of your W-2 Wage and Tax Statement and
- IRS Form 8879 (IRS e-file Signature Authorization)

1. For ATCAA to meet IRS program requirements, your household's expected **2017 Adjusted Gross Income should not exceed \$54,000. Initial _____**
2. For ATCAA to provide this service and meet our state requirements, we need to know your approximate household income. **Please mark with an "X" the income level below.**

Size of Family	Monthly Income	Annual Income	MARK WITH X
1	\$990.00	\$11,880	
2	\$1,335.00	\$16,020	
3	\$1,680.00	\$20,160	
4	\$2,025.00	\$24,300	
5	\$2,370.00	\$28,440	
6	\$2,715.00	\$32,580	
7	\$3,061.00	\$36,730	
8	\$3,408.00	\$40,890	

I understand and agree to the above, and certify that my income is as indicated.

SIGNATURE _____

Print Name _____

1/20/2018



ATCAA Drop-Off VITA Tax Preparation Information

Please complete all ATCAA and IRS forms before dropping off your tax information. Make sure you have received and given us all the documents from your employers and financial institutions. You can use our checklist to insure you have all of the information needed to prepare your returns. It also is helpful if you include a copy of your prior year tax return.

IRS regulations require us to verify all taxpayers' identities. You (and your spouse if filing together) must show proof of identity, such as driver's license, employer ID, school ID, birth certificate or passport. You also must show a Social Security Card, an ITIN letter, or an SSA letter for each person who will be listed on your tax return.

YOUR tax return information may be sent to another location for one or more of the following reasons; interviewing the taxpayer, preparing the tax return, or performing a quality review. All information will be sent to other locations via a secure internet site. You will be required to return to our office for a review of your taxes and to sign the completed tax return.

Direct Deposit: If you want your refund directly deposited into your bank account, please attach a voided blank check.

When you drop off your documents, we will contact you within seven (7) business days about the status of your return. **We must have a phone number or email address where you can be reached or receive a message.** After we contact you, **YOU MUST RETURN OUR CALL/VOICEMAIL WITHIN SEVEN (7) DAYS,** or we will mail your paperwork back to the address we have on file.

If you want to file your tax return electronically, please understand that **YOUR TAX RETURN IS NOT E-FILED UNTIL AFTER YOUR AUTHORIZATION FOR US TO E-FILE (FORM 8879) IS SIGNED. BOTH SPOUSES MUST SIGN IF FILING TOGETHER.** You may also file your prepared tax return by mail.

Tear Here/Give TOP to client. Keep bottom in client processing file.

I have read the above about Drop-Off Tax Preparation and understand that ATCAA's Tax Program will NOT prepare my tax return until I have provided all required information. **I am responsible** for staying in contact until my tax return is completed, signed, and filed with the IRS. My tax return is not e-filed until after I (we) return to ATCAA and sign the consent to e-file Form 8879. If ATCAA can not reach me to complete my return, the agency will mail my documents to the address on file.

Print Name: _____

Print Spouse's Name: _____

Date: _____

Signature: _____

Spouse's Signature: _____

Date: _____



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JACKSON SERVICE CENTER
935 S. Highway 49 Jackson, CA. 95642
Phone: 209-223-1485

SONORA SERVICE CENTER
427 N. Highway 49, Ste 305 Sonora, CA. 95370
Phone: 209-533-1397

Amador Tuolumne Community Action Agency | ATCAA.org

A Public Agency Dedicated To Providing Critical Human Services Since 1981

So that we may continue to provide services to you and others in our community, we ask that you please fill out our quick survey below. THANK YOU.

SERVICE NEEDS SURVEY

Date _____

1. Have you received Services through ATCAA before? ___ Yes ___ No What County do you reside in? _____

What ATCAA programs has your family used?

- | | | |
|---|--|--|
| <input type="checkbox"/> Energy Bill Assistance | <input type="checkbox"/> Food Assistance (Tuol.) | <input type="checkbox"/> Housing Assistance |
| <input type="checkbox"/> Homeless Shelter | <input type="checkbox"/> Home Weatherization | <input type="checkbox"/> Lifeline Senior (Amador) |
| <input type="checkbox"/> Tax Assistance | <input type="checkbox"/> Head Start/Early Head Start | <input type="checkbox"/> Mentoring Works (Tuol.) |
| <input type="checkbox"/> Promotores de Salud | <input type="checkbox"/> Budgeting Classes (Amador) | <input type="checkbox"/> Family Learning Ctr Svs (Tuol.) |
| <input type="checkbox"/> Youth Programs What? _____ | <input type="checkbox"/> Water Conservation Assistance | <input type="checkbox"/> Other What? _____ |

2. If you have not received services through ATCAA, what was the reason?

- I did not need any help
- Do not know what I am eligible to receive
- Do not know how to access services
- I am uncomfortable to ask for services
- My family member(s) will not allow us to ask for help
- I don't have transportation (a car) to access services
- Too far away
- No public access
- I am too busy working and taking care of my family
- I have a disability that makes accessing services difficult for me
- I don't have access to a computer/internet

3. If you were provided only three community services, what would help you most? (Please select three from the list below.)

- | | |
|---|---|
| <input type="checkbox"/> Food | <input type="checkbox"/> Affordable Child Care |
| <input type="checkbox"/> Receive information about job openings | <input type="checkbox"/> Affordable Medical/Dental Services |
| <input type="checkbox"/> Job Training | <input type="checkbox"/> Affordable Rental /Housing |
| <input type="checkbox"/> Gasoline | <input type="checkbox"/> Assistance with Electric /Propane |
| <input type="checkbox"/> Transportation | <input type="checkbox"/> Assistance with Water Bills |
| <input type="checkbox"/> EBT/SNAP (Food Stamps) | <input type="checkbox"/> Assistance with Telephone Bills |
| <input type="checkbox"/> Income Tax Preparation | <input type="checkbox"/> Drug Free Youth Activities |
| <input type="checkbox"/> Job Placement | <input type="checkbox"/> Computer Classes |
| <input type="checkbox"/> Landlord/Tenant Issues | <input type="checkbox"/> Other _____ |

4. How did you learn about ATCAA programs?

- | | |
|---|---|
| <input type="checkbox"/> My family or friends/neighbors | <input type="checkbox"/> Referral from another Agency |
| <input type="checkbox"/> My employer told me | <input type="checkbox"/> Brochures or Flyers |
| <input type="checkbox"/> My child's school | <input type="checkbox"/> ATCAA Staff referred me |
| <input type="checkbox"/> I saw it in the media | <input type="checkbox"/> Social Media (Facebook, Instagram, Twitter, YouTube) |

5. How do you rate the over-all satisfaction of ATCAA services/programs?

- Great Good Neutral Poor

6. Comments Welcomed: _____