

WHAT TO BRING TO YOUR TAX APPOINTMENT

To schedule an appointment call
East Bay Community Action Program, Office of Volunteer Services
401-680-2005 or 401-435-7876

- Drivers License/Government issued photo I.D. for you and your spouse
 - If married and filing a joint return SPOUSE MUST BE PRESENT
 - Social Security Card(s) for self, spouse and ALL dependents NO EXCEPTIONS
 - For Direct Deposit – Bring A Check, or a Savings Account Number with Routing Number
 - Prior tax years state and federal return. If you own your own home it is MANDATORY
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- Please bring all documents that prove source of income
 - All W-2s & Unemployment statements
 - All Forms 1095, Health Insurance Statements
 - Health Insurance Exemption Certificate
 - Self-Employment Income-Expenses may not exceed \$5000.00.
 - Social Security Benefit Statement-SSA 1099
 - All 1099's – interest/dividends/misc. income/gambling/cancellation of debt/pensions and annuities
 - Student loan statements – simple statement
 - Education credits for tuition and fees – Form 1098 T
 - Stock and Bond Statements
 - All HSA (Health Savings Account) documentation
 - Child & Dependent Care Expense – Day Care Statement (must include Tax Identification Number (SSN, EIN) of the care provider and amount paid- individuals who provided daycare need to provide a Social Security number
 - For Property Tax Credit –For the elderly and disabled only. Rent Receipts or cancelled check and landlords name & complete address. If you own your own home bring your Real Estate Property Tax Statement.
 - State Return Policy: We only process State returns if we process your Federal return.
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- Combined income may not exceed \$55,000.
 - We are unable to complete returns for individuals who own Rental Property or those who have Self Employment expenses over \$5000.00.
 - The VITA tax program does not process tax returns related to bankruptcy
 - Call at least 48 hours prior if you need to cancel your appointment.
 - By Appointment Only
 - No-shows may wait up to 3 weeks for an additional appointment