



# Tax Preparation, United Way

## KEEP MORE OF THE MONEY YOU EARNED!

- IRS Certified Tax Preparers
- 100% of your refund with no fees or interest.
- Free Preparation and E-filing of your tax return.
- Free Earned Income Tax Credit and Child Tax Credit Screenings.
- Multiple filing options available.

**Safe. Convenient.**

**Free. Professional.**

## Pick up and drop off your taxes!

Pick up packet at any location and drop off completed packet at any location.

The packet contains all necessary forms and instructions. Packets will be available at sites starting on January 29th. If your abilities do not allow you to complete the forms in the packet, please call and arrangements can be made to accommodate your needs. Once we receive your packet, if we have all needed information your taxes will be completed and a tax review appointment will be scheduled to review the returns and give permission to e-file your taxes.

Kokomo Howard County Public Library (KHCPL)- Downtown- 220 N. Union St. -Kokomo IN 46901

KHCPL South Branch- 1755 E. Center Rd.- Kokomo IN 46902

KHCPL Russiaville- 315 Mesa Dr.-Russiaville IN 46979

Greentown Public Library- 421 S Harrison - 301 S Meridian-Greentown, IN 46936

Tipton Public Library- 127 E Madison St, Tipton, IN 46072

## Don't want to leave your house to file taxes?

If you have a household income of \$60,000 or less, file straight from your couch (or wherever you're comfortable).

**myfree**  
**taxes.com**

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SERVING HOWARD AND TIPTON COUNTIES

## Tax admissions materials needed

- Valid photo ID
- Social Security cards or ITIN cards for all persons on the return
- W2 forms for all workplaces in 2023
- Interest and dividend statements
- Form 1095-A if you purchased health insurance through healthcare.gov in 2023.
- All 1099 forms received, including 1099-SSA from the Social Security Administration and unemployment statements.
- Education expense receipts and Form 1098-T.
- Child care receipts, along with provider's address and Social Security number/employee identification number.
- Real estate property tax receipts.
- Landlord name, address, and amount of rent paid in 2023.
- Bank routing number and account number for direct deposit.
- Copy of last year's tax return (not required but helpful to have)

\*Free Tax Preparation services are not available if, in 2023, you owned or sold rental property, sold a business, had more than \$10,000 in business expenses, bought or sold stocks, bonds, or mutual funds.

**765-450-7619**

**Questions? Email**

**[freetaxprep@unitedwayhoco.org](mailto:freetaxprep@unitedwayhoco.org)**

**Find more information about free tax options at [howardandtiptonunitedway.org](http://howardandtiptonunitedway.org)**

# UNITED WAY FREE TAX PREPARATION

## Option 1

*myfree*  
**taxes.com**

If you make **<\$60,000** annually you can file your federal and state tax returns free with MyFreeTaxes.com. This includes state filing and limited forms will be available.

## Option 2

**Pick up and drop off your taxes!**

If you make **<\$66,000** annually you can pick up a tax packet at

- Kokomo Howard County Public Library (KHCPL)- Downtown
- KHCPL South Branch
- KHCPL Russiaville
- Greentown Public Library
- Tipton Public Library

Complete the packet and return it in the book drop at ANY of the libraries. Once you have dropped off your forms, you will hear back from United Way in 21 business days. We will set up an appointment to review your taxes and get permission to file them.

Call 765-450-7619 or visit  
[howardandtiptonunitedway.org](http://howardandtiptonunitedway.org)  
for more information.



# WHAT CAN YOU DO IN A COUPLE OF HOURS

## TAX PREP VOLUNTEERS



### Taxpayer Support

- Provide customer service
- Assist with phone calls and emails
- Respond to taxpayers inquires about preparing their own tax returns
- Ensure taxpayer has the necessary documentation
- Make inquiries to determine all income, deductions, and allowable credits are claimed
- Volunteer standards of conduct and tax law certification necessary

### Tax Preparer/ Quality Reviewer

- Prepare tax returns and quality reviews based on information provided by the taxpayer
- Volunteer standards of conduct, intake interview and tax law certification necessary

### Site Coordinator

(Taxpayer Support and Preparer/Quality Review responsibilities are included in this position)

- Office management role
- Scan and electronically transfer tax documents
- Assist with work flow
- Recognize tax returns that are out of scope for the program
- Managing volunteer schedules, work flow and tax return queue
- Electronically filing tax returns
- Volunteer standards of conduct, intake interview, tax law and Site Coordinator certification necessary

Questions? Please contact United Way at 765.457.4357 ext. 320, 210 W Walnut St Kokomo, IN



**INTERESTED?** (CHECK THE BOX BESIDE THE VOLUNTEER DESCRIPTION YOU'RE INTERESTED IN)

Taxpayer Support

Tax Preparer /Quality Reviewer

Site Coordinator

Name: \_\_\_\_\_

Email: \_\_\_\_\_

Phone: \_\_\_\_\_

How did you hear about us? \_\_\_\_\_