

# TAX ASSISTANCE OPTIONS 2025

## LOCAL IN-PERSON FILING ASSISTANCE:

### 1. Contact a local tax preparer:

- Fees vary based on forms and schedules you need completed

### 2. AARP:

Local phone: 920-393-7863

- Call after January 6th to schedule an appointment
- **By appointment only** – to make an appointment call to leave a message with your name & call back number and someone will call back within 1-2 days
- Operation sites: Ashwaubenon Community Center, Howard Village Hall, Kress Family Library in De Pere, Allouez Village Hall, and Brown County Library East Branch, Brown County United Way

### 3. UWGB & St. Norbert College – VITA Site:

Website: [uwgb.edu/vita](http://uwgb.edu/vita)

Phone: 920-785-8878

UW-Green Bay Wood Hall Room 118

2380 Wood Hall Drive Green Bay, WI 54311

- Call after January 15<sup>th</sup> to schedule appointment
- **By appointment only** – to schedule appointment visit online [uwgb.edu/vita](http://uwgb.edu/vita).

### 4. NWTC – VITA Site:

Website: [nwtc.edu/community-members/vita-free-tax-preparation](http://nwtc.edu/community-members/vita-free-tax-preparation)

Contact for more information: Theresa Grover, VITA Site Coordinator, 920-491-2655

- **By appointment only** – to schedule appointment visit online

### 5. Homestead Only:

Phone: 608-266-8641

State Tax Office

200 N Jefferson St, Rm 140; Green Bay, WI 54301

- Accepting walk-in appointments for drop-off of completed forms or to have someone assist in completing forms

VITA stands for Volunteer Income Tax Assistance; partnered with the Internal Revenue Service (IRS). Provides free tax help to people with low-to-moderate incomes (annual income of less than \$60,000/year), people with disabilities, and limited English-speaking taxpayers who need assistance in preparing their own tax returns.

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## D.I.Y. ON-LINE FILING OPTIONS:

### 1. FreeTaxUSA:

Website: [freetaxusa.com](http://freetaxusa.com)

- Including Military Personnel and Veterans

### 2. WI State Department of Revenue (DOR):

Website: [revenue.wi.gov/Pages/WI-efile](http://revenue.wi.gov/Pages/WI-efile)

- Information and online filing of WI state taxes including Homestead

### 3. Federal IRS:

Website: [irs.gov/individuals](http://irs.gov/individuals)

- Information and online filing for federal taxes

## DOCUMENTS NEEDED:

- If filing a joint return, both spouses must be present to sign the required forms**
- Proof of identification (photo ID) for you & your spouse
- Social Security cards, SSA-1099, or Individual Taxpayer Identification Number (ITIN) for you, your spouse, & dependents
- Birth dates for you, your spouse, & dependents on the tax return
- A copy of last year's federal & state returns, if available
- Wage & earning statements (Form W-2, W-2G, 1099-R, 1099-Misc) from all employers
- Interest & dividend statements from banks (Forms 1099)
- Health Coverage Statements (Marketplace insurance - Forms 1095-A, B, & C)
- Educational expenses
- Daycare expenses and daycare provider's tax identifying number (i.e., Social Security number or Employer Identification Number)
- Bank routing and account numbers if you want to direct deposit (a check will have this information)
- Unemployment compensation statement (1099-G)
- \* If you believe you will be eligible for **Wisconsin Homestead Credit**, available to qualifying Wisconsin residents with an income under \$24,680, you will also need:
  - Child Support received during the year you are filing
  - Social Security benefits received during the tax year, including:
    - Federal & State SSI amounts
    - SSI-E
    - SSD
    - Caretaker Supplemental Payments
  - Wisconsin Works (W-2) payments
  - Property tax bill or rent certificate