

TAX ASSISTANCE OPTIONS 2024

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 2nd to schedule 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

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

Website: uwgb.edu/vita

Phone: 920-393-7845

Brown County Central Library

515 Pine Street; Green Bay, WI 54301

- Call after January 15th to schedule appointment
- **By appointment only** – to schedule appointment call or visit online
- Wednesdays, February 2 - April 4 from 5pm - 8pm

4. NWTC – VITA Site:

Website: 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. Goodwill NCW – VITA Site:

Website: goodwillncw.org/vita

Phone: 920-968-6044

Goodwill NCW Menasha

1800 Appleton Rd; Menasha, WI 54952

- **By appointment only** – to schedule appointment call or visit online
- Monday-Thursday (Jan 29,2024 through March 28,2024) 12:30p.m.-4:00p.m. Saturday (Feb 10,24 March 9, and 23) 8:00 a.m.-12:00 p.m.

6. 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

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returns.

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

1. FreeTaxUSA:

Website: freetaxusa.com

- Including Military Personnel and Veterans

2. WI State Department of Revenue (DOR):

Website: revenue.wi.gov/Pages/WI-efile

- Information and online filing of WI state taxes including Homestead

3. Federal IRS:

Website: 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

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- Wisconsin Works (W-2) payments
- Property tax bill or rent certificate