

# Free Income Tax Preparation

for low-income families and individuals

By appointment only • IRS-certified volunteers



## You may qualify for the Earned Income Tax Credit!

To qualify, your annual income must be *less* than:

- \$49,298 (\$54,998 if married filing jointly) with three or more qualifying children
- \$45,898 (\$51,598 if married filing jointly) with two qualifying children
- \$40,402 (\$46,102 if married filing jointly) with one qualifying child
- \$15,310 (\$21,000 if married filing jointly) with no qualifying children
- Taxpayers with no qualifying children must be between the ages of 25 and 65
- If married, couples must file jointly
- All qualifying children must have a valid social security number
- Must be a U.S citizen or resident alien

## Appointments available in Beverly

Call 978-927-1561 today for an appointment at:

Beverly Bootstraps  
35 Park Street, Beverly

| MONDAY by appointment                          | WEDNESDAY by appointment                        | THURSDAY by appointment                         | SATURDAY by appointment                        |
|--|---|---|--|
| February 5 - April 9<br>4:00 p.m. to 7:00 p.m. | February 7 - April 11<br>4:00 p.m. to 7:00 p.m. | February 8 - April 12<br>4:00 p.m. to 7:00 p.m. | March 17 - April 14<br>9:00 a.m. to 12:00 p.m. |

Use the back of this page to note the date and time of your appointment and for a checklist of what to bring.



Tax services are provided by Beverly Bootstraps and are funded by the United Way of Massachusetts Bay and Merrimack Valley. Please note we cannot prepare tax returns for residents of Puerto Rico.

## My Tax Appointment:

**Date:** \_\_\_\_\_

**Time:** \_\_\_\_\_

**At:** Beverly Bootstraps, 35 Park Street, Beverly

## Items to Bring:

When you come to your appointment, be sure to bring:

- Proof of identification (photo ID)
- Social Security cards for you, your spouse, and dependents or a Social Security number verification letter issued by the Social Security Administration
- An Individual Taxpayer Identification Number (ITIN) assignment letter may be substituted for you, your spouse and your dependents if you do not have a social security number
- Proof of foreign status, if applying for an ITIN
- Birth dates for you, your spouse and dependents on the tax return
- Wage and earning statements (Form W-2, W-2G, 1099-R, 1099-Misc) from all employers, Social Security and unemployment
- Interest and dividend statements from banks (Forms 1099)
- Records of expenses, such as tuition, mortgage interest, real estate taxes, business expenses
- A copy of last year's federal and state returns, if available (Required if you own your home or are itemizing deductions)
- Proof of bank account routing and account numbers for direct deposit such as a blank check
- To file taxes electronically on a married-filing-jointly tax return, **both spouses must be present** to sign the required forms
- Total paid for daycare provider and the daycare provider's tax identifying number such as their Social Security number or business Employer Identification Number
- Forms 1095-A, B or C, Affordable Health Care Statements
- Copies of income transcripts from IRS and state, if applicable