

# Free Income Tax Preparation

for low-income families and individuals

Completed on-Site, by appointment only



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

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

- \$51,464 (\$57,414 if married filing jointly) with three or more qualifying children
- \$47,915 (\$53,865 if married filing jointly) with two qualifying children
- \$42,158 (\$48,108 if married filing jointly) with one qualifying child
- \$21,430 (\$27,380 if married filing jointly) with no qualifying children
- Taxpayers with no qualifying children must be 19 years or older (25 if a student)
- If married filing separately, children must reside with you
- Must be a U.S citizen or resident alien

**Appointments available at Beverly Bootstraps, 35 Park St., Beverly**

**Call 978-927-1561 starting January 17 to schedule an appointment:**

**When to call us:** Mondays and Thursdays from 2:00 pm to 6:00 pm

Tuesdays from 9:00 am to 12:00 pm

Fridays from 2:00 pm to 4:00 pm

MONDAYS	WEDNESDAYS	FRIDAYS	SATURDAYS
February 6 - April 10	February 8 - April 12	February 3 - April 7	March 18 - April 8
4:00 p.m. to 7:00 p.m.	4:00 p.m. to 7:00 p.m.	11:00 a.m. to 2:00 p.m.	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.**

**BB** **BeverlyBootstraps**  
EMBRACE · EDUCATE · EMPOWER

Tax services are provided by Beverly Bootstraps. 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:**

1. **Photo ID** such as Driver's License or Passport;
2. **Social Security cards** for you, your spouse, and all dependents;
3. **A copy of last year's tax return;**
4. **Income information:**
  - Wages and earnings (Form W-2, 1099-Misc, 1099-NEC, 1099-K) from all employers;
  - Social Security (SSA-1099), pensions or IRA (1099-R);
  - Interest from banks (1099-INT) and dividends (1099-DIV);
  - Unemployment Compensation (1099-G);
  - Gambling or Lottery winnings (W-2G);
5. **Health insurance information:**
  - Health Insurance Cards and coverage information (1095-A, 1095-B, or 1095-C, 1099-HC);
6. **Information about Expenses:**
  - Childcare expenses: statement from daycare provider with amount paid and the provider's tax ID number;
  - Education expenses: Tuition: 1098-T, Student loan interest: 1098-E;
7. **Homeowners 65 and over:** property tax and excise tax bills, water/sewer bills;
8. **Bank account information:** routing and account numbers for direct deposit, such as a blank check, which will be returned to you;
9. **Both spouses must be present** to file a **married-filing-jointly** tax return, and **both must sign** the required forms.