



# CSVP Volunteers Provide Income Tax Assistance

In cooperation with the Internal Revenue Service, trained and certified CSVP volunteers will provide FREE income tax preparation for persons in either of these categories:

- Seniors 60 years of age or older (any income level) OR
- Persons with an income of \$56,000 or less, regardless of age

Goebel Adult Community Center

1385 East Janss Road, Thousand Oaks, CA 91362

WE WILL BE MAKING LIMITED APPOINTMENTS BEGINNING FEBRUARY 10. THIS WILL BEGIN AS A HYBRID IN-PERSON/VIRTUAL PROGRAM. THE IN-PERSON TAX PROGRAM WILL PROCEED WHEN VENTURA COUNTY MOVES TO RED TIER. DUE TO HIGH VOLUME CALLS, PLEASE LEAVE A MESSAGE AND STAFF WILL GET BACK TO YOU AS SOON AS POSSIBLE. CALL THE CONEJO SENIOR VOLUNTEER PROGRAM OFFICE AT 805-381-2742 TO MAKE AN APPOINTMENT OR FOR MORE INFORMATION.

## PLEASE BRING THE FOLLOWING ITEMS:

1. Photo identification
2. The completed (attached) 13614-C Intake/Interview form (an online fillable PDF is available at <https://www.irs.gov/pub/irs-pdf/f13614c.pdf>) If you use the online form, you must print it and bring it with you.
3. Social Security card(s) - (this is required for all dependents and taxpayers)
4. A copy of last year's Federal and State return (unless we did your tax return last year)
5. Birth dates for you, your spouse, and any dependents on tax return
6. Wage and earning statements (W2's and 1099's); Social Security Benefits (1099-SSA) plus any pensions, annuities, and IRA/401(k) distributions (1099-R's)
7. Interest and dividend statements (1099 INT; 1099 DIV; 1099-B)
8. Unemployment Compensation (1099-G)
9. State refunds (1099-G)
10. Any cancellation of debt (1099-C)
11. Gambling Winnings (W-2G)
12. Any miscellaneous income reported on a **1099-MISC or 1099-NEC**
13. The **Economic Incentive Payments** amounts received, last spring (\$1200/500) and this winter (\$600); these amounts are NOT taxable by either the IRS or CA, but we want to ensure you received your full amount due.
14. Health Insurance Information: (a 1095-A is required for health insurance coverage obtained through Covered California (the "marketplace"))
15. A blank or voided check-routing numbers and account numbers (deposit of refunds or direct debit of a balance due)
16. Any other relevant information about **income, expenses and deductions** (complete the deductions worksheet).
17. If there will be a college student on the tax return, a Tuition Statement – **1098-T** is required
18. Business income and expenses for Schedule C—**We ONLY do Schedule C returns, if there's a profit and expenses are Under \$35,000; without home use, inventory, or depreciation. If you are self-employed, complete the self-employment worksheet**

## We CANNOT provide Income Tax Assistance for the following:

- Rentals (Schedule E – house or room rentals)
- Out-of-state returns
- Married filing separate returns

For more information, contact the Conejo Senior Volunteer Program at 805-381-2742 or [csvp@crpd.org](mailto:csvp@crpd.org)