

HIGH COUNTRY VOLUNTEERS

TAX ASSISTANCE PROGRAM

Will Prepare

- Wages, salaries, etc. (Form W-2)
- Interest Income (Form 1099-INT)
- Dividends Received (Form 1099-DIV)
- State Tax Refunds (Form 1099-G)
- Unemployment Benefits (Form 1099-G)
- IRA Distributions (Form 1099-R)
- Pension Income (Forms 1099-R)
- Social Security Benefits (Form SSA-1099)
- Simple Capital Gain/Loss (Form 1099-B) limited
- Sale of Home (Form 1099-S) limited
- Prior Year and Amended Returns
- Self-Employed Income (Form 1099-MISC) limited
- Gambling Winnings (Form W-2G)
- Cancellation of Debt (Form 1099-C) limited
- Health Savings Accounts (Form 1099-SA) limited
- Itemized Deductions limited
- Education Credits (Form 1098-T)
- Health Insurance Statements (Forms 1095-A, B or C)
- Credits for Sick Leave and Family Leave (Form 7202)

Will Not Prepare*

- Schedule C with loss, depreciation or business use of home
- Complicated Schedule D (capital gains/losses)
- Form SS-5 (request Social Security number)
- Form 8606 (non-deductible IRA)
- Form SS-8 (Determination of worker status)
- Parts 4 & 5 of Form 8962 (Allocation of Policy Amounts, Alternative Calculations for Year of Marriage)
- Form W-7 (application for ITIN)
- Returns with casualty/disaster losses

***Please see a professional preparer for assistance with complicated returns.**

What to Bring

- Government issued photo id for you and spouse
- Social Security cards or Individual Taxpayer Identification Number documents for you, your spouse, and/or dependents
- Birth dates for you, your spouse, and/or dependents
- A copy of last year's return if we did not prepare your taxes
- W-2'(s)
- SSA 1099
- 1099 - Interest/dividends
- 1099-G Unemployment
- 1099-MISC - Misc. income
- 1099-R - Pension/annuity
- 1098-T - College tuition/expenses
- 1095-A - Marketplace health insurance
- Childcare expenses/information
- Charitable contributions/information
- Amount of estimated taxes paid
- Copy of bank account and routing information

Call 970-896-6210 to schedule an appointment Feb. 1- April 12