University of Wisconsin Whitewater

FREE Tax Return Preparation – Spring 2023

From February 1 through April 12, IRS-certified accounting students from UW-Whitewater will assist with the preparation of your federal and state personal income tax returns. This program, called VITA, will be open from 3:30 p.m. to 6:00 p.m. on Wednesdays. The UW-Whitewater VITA clinic is located in the UW-W Community Engagement Center, 1260 W Main Street, Whitewater, WI 53190 (next to Wal-Mart). There is plenty of free parking located in front of the UW-W Community Engagement Center for VITA participants to use.

UW-Whitewater students that have obtained proper IRS certification will prepare federal and state personal income tax returns for taxpayers of the community. The VITA program offers free tax help to those in need and is aimed at serving individuals that make approximately $60,000 or less. No appointment is necessary; returns are completed on a first come – first served basis.

Here is a list of what you should bring when visiting the UW-W VITA site [A]:

- **Proof of identification (photo ID)**
- **Social Security cards for you, your spouse and dependents [B]**
- Birth dates for you, your spouse and dependents on the tax return
- Any wage and earning statements (Form W-2, W-2G, etc.) from employers
- Any 1099 forms received (INT, DIV, NEC, MISC, G, R, etc.)
- Any 1098 forms received (Mortgage Interest, E, T, etc.)
- Summary of charitable contributions made during the year (check, check, non-cash)
- Forms 1095-A, B and C, Health Coverage Statements (if applicable)
- Total paid for daycare provider and the daycare provider's tax identifying number
- Summary of income and expenses for any sole proprietorship small businesses owned
- Copy of income transcripts from the IRS and state, if applicable.
- A voided check or other support for a valid bank account if you want direct deposit of your refund. (document must show bank routing and account numbers). NOTE: Taxpayers are responsible for verifying their bank numbers for any potential direct deposit of refund.
- If eligible for the Wisconsin homestead credit:
    - Bring a Renter's Certificate from your landlord and the amount of rent paid during 2022 (if you rented); OR
    - Your 2022 property tax bill (if you own instead of rent your home)
- Any other relevant tax information that you may have receiving during the year.

Any questions about the VITA program?
Please contact Brian @ 262-472-5452

[A] To file taxes electronically taxpayer and spouse (if a married filing joint tax return), must be present to sign the required forms

[B] 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. Or, if you are applying for an ITIN, you need to show proof of your foreign status.