



Eastern Shore Area Agency on Aging Community Action Agency



Volunteer Income Tax Assistance

For information or to arrange for FREE Tax Preparation services
Please call Francine McDonald (757) 442-9652 or email fmcdonald@esaacaa.org

What Documents will I need?

Personal Information (bring all documents)

- Valid Picture ID
- Taxpayer Identification Number: Social Security Card, Social Security Number verification letter, or Individual Taxpayer Identification Number
- Last Year Tax Returns

Proof of Income (bring all documents that apply)

- W-2s for all jobs last year
- 1099s for any other income received last year
- Statements for prizes, scholarships/fellowships or lottery/gambling winnings

Proof of Health Insurance (bring all documents that apply)

- 1095-A if you had coverage through the HealthCare.gov (Obamacare)
- 1095-B or 1095-C if you had other kinds of insurance or coverage

Additional Items (bring all documents that apply)

- Checking and Savings Account Information to have your refund directly deposited to your account
- Tax Return from last year, if available
- Child Care Expenses: Provider's address and federal tax ID number
- Homeowners: Mortgage statements and property tax bills
- Education: College tuition and student loan statements
- Alimony: Paid or received
- Notices: IRS, state tax, health insurance marketplace or anything that says "IMPORTANT TAX DOCUMENT"

***Under no circumstances will the Internal Revenue Service tolerate discriminatory treatment of taxpayers by its employees, or individuals who volunteer or work at Low-Income Tax Clinics, Volunteer Income Tax Assistance and Tax Counseling for the Elderly sites. No taxpayer shall be subject to discrimination based on sex in educational programs or activities, or race, color, national origin, reprisal, disability or age in programs or activities supported by the department of the Treasury Internal Revenue Service.**