



Transitional Assistance

e-File your Federal and State return for **FREE**



**SELF-SERVICE TAX E-FILING BEGINS
FEB. 12, 2021**

Available to **Eligible** individuals and families who in 2020:

- Have an Adjusted Gross Income (AGI) of \$72,000 or less, or
- Qualify for the Earned Income Tax Credit (EITC).

If you worked in 2020, you may be eligible to receive the:

- ▶ **California Earned Income Tax Credit**, for a refund up to \$3,027.
- ▶ **Federal Earned Income Tax Credit**, for a refund up to \$6,660.

Eligibility depends on your income and family size

Use the link or QR code below to begin e-filing your 2020 taxes:

English: <https://www.olt.com/main/vita/getstarted.asp?affiliate=VITAFREE&linkID=S72013966>

Spanish: <https://www.irs.gov/filing/free-file-ofrece-el-software-en-espanol>

* Sites must be accessed with Google Chrome, Microsoft Edge, Firefox or Safari only.

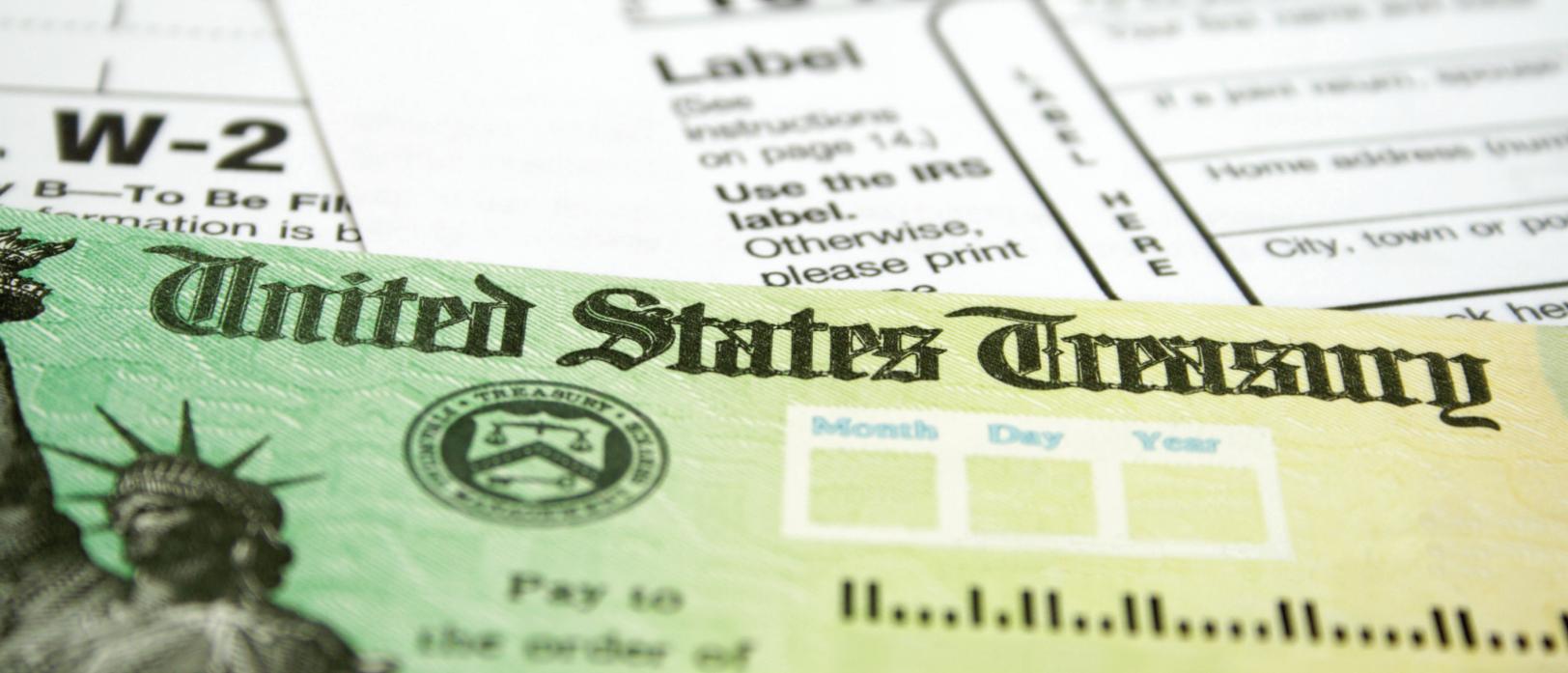


English



Spanish





WHAT DO I NEED TO SELF-PREPARE AND E-FILE MY TAXES?

1 Identification

For all persons listed on the tax return:

- ✓ Birthdate(s)
- ✓ Social Security Number(s)
- ✓ Individual Tax Identification Number (ITIN)



2 Income

- ✓ W-2s for each job worked in 2020
- ✓ All 1099 forms received
- ✓ Year-end income for Social Security Insurance, workers' compensation and unemployment insurance benefits



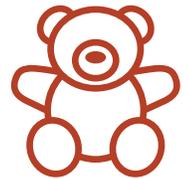
3 Education Credits & Adjustments

- ✓ Tuition expenses for university, college or technical college (Form 1098-T)
- ✓ Interest statement for student loans (Form 1098-E)



4 Child Credits

- ✓ Child care expenses: provider name, address, phone number, and Tax ID or Social Security number



5 Property Taxes

- ✓ Homeowner statements: which include real estate taxes paid, or a property tax statement



6 Itemized deductions

- ✓ Charitable donations
- ✓ Medical expenses
- ✓ DMV registration statement(s)
- ✓ Mortgage interest statement(s) (Form 1098)



7 Additional documents

- ✓ Copy of 2019 tax return
- ✓ Direct deposit information: voided check or routing and account number
- ✓ Health Insurance documents (Form 1059 A, B or C)



Additional assistance and tax support is available through:

- IRS Certified TAD staff at (909) 515-8715
- Interactive Tax Assistant via irs.gov/help/ita
- IRS hotline at (800) 829-1040

<https://wp.sbcounty.gov/tad/resources>