

VITA - VOLUNTEER INCOME TAX ASSISTANCE 2023

This is a free tax service for paid-up members of AEA and SAG-AFTRA.
It is sponsored by the Unions' Foundations & Internal Revenue Service (IRS).

Equity Building, 165 West 46th Street, 14th Floor – 212-921-2548

PLEASE READ AND SIGN THIS FORM

▶ **You will NOT be seen unless you have the following:**

1. **Three (3) Pieces of ID:** Paid-Up Union Card for union members, and Current Driver's License or State ID, Social Security Card(s) for all persons whose names appear on the tax returns.
Copies of each are acceptable.
2. **Last year's federal and state tax returns**, if you did **not** have them prepared in the NY VITA office.
3. **The VITA worksheets printed out and COMPLETED** (call the office or stop in with any questions).
4. **W-2s, 1099s and other statements** sent by employers, banks, credit unions, other states, brokerages, and any other information, including your own records.
5. **Your 1095-A Form** if you purchased health insurance through the Marketplace.

▶ **We will provide assistance to those whose incomes are within the following limits:**

Less than \$100,000 for single filers and less than \$200,000 for married filers. VITA is dedicated to serve low-income and middle-income members. *(See page 3 for the total income worksheet.)*

▶ **The Volunteers who assist you are not paid and are not on staff at any of the Unions.**

This VITA office is supported in part by contributions from the Foundations of AEA and SAG-AFTRA to assist its members. Actors' Equity Association generously provides our office space and IT assistance.

▶ **VITA may only file returns that reflect honest and accurate accounts**

We may not assist in the filing of fraudulent or dishonest tax returns! **VITA is an IRS program and must adhere to strict rules governing accuracy and fairness.** Therefore, we must require your cooperation in not requesting special treatment (you may not choose who prepares your returns) and by providing us with accurate information (**deductions must be actual expenses**).

▶ **Neither the Volunteers nor their sponsoring unions receive remuneration for the assistance you are receiving.**

The Volunteers are NOT LEGALLY LIABLE FOR THE RETURNS IN ANY WAY. Responsibility for the accuracy and completeness rests **solely** with the person(s) filing the returns. Should the return(s) be audited by the IRS or any state agency, there is no guarantee that the Volunteer who assisted in the preparation will be available to help. By participating in this program, you agree to allow VITA to retain your personal information.

I understand and agree to the above information.

Sign your name

Date