

VOLUNTEER INCOME TAX ASSISTANCE - VITA

2024 RULES FOR MEMBERS



NAME: _____ EMAIL: _____

**This is a free tax service for paid-up members of AEA and SAG-AFTRA.
It is sponsored by the Foundations of AEA and SAG-AFTRA and 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:** Originals or Copies of the following:
 - A) Paid-Up Union Card** for union members, and.
 - B) Current Driver’s License** or State Photo ID – FRONT AND BACK (if you have one), and.
 - C) Social Security Card(s)** for all persons whose names appear on the tax returns. If you are receiving Social Security Benefits, you only need your 1099-SSA form (pink and white 1099).
- 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 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. Bring **paper** copies with you.
- 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 that you can substantiate**).

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 of your income tax returns 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.

12/29/24-SK _____ Sign your name _____ Date
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