



# VOLUNTEER INCOME TAX ASSISTANCE - VITA 2024 TOTAL GROSS INCOME WORKSHEET



NAME: \_\_\_\_\_

## Married Couples Use Separate Forms

Please note that due to the complexity of the tax laws and the IRS limitations on VITA, we may not assist with the preparation of returns with any of the following:

- Rental Income or Loss
- Foreign Earned Income (work outside the United States)
- Start-Up Business Ventures or Losses (Self-Produced projects for film, music, theatre, or Indiegogo, Fractured Atlas, GoFundMe, Kickstarter, Seed & Spark, and other crowd-funded sources)
- K-1 Income or Losses (reported from S Corporations, Partnerships (general or limited), Estates and Trusts)
- Sales of Real Property (rental homes, personal residences, time-shares, etc.)
- Sales of Assets (Investments, Stocks, Bonds, etc.) without Cost Basis
- Farm Income

1. Total <b>Box 1</b> of <b>ALL W-2</b> Forms	\$ _____
2. Total <b>Box 1</b> of all 1099-INTEREST (or year-end totals)	\$ _____
3. Total <b>Box 1a</b> of all 1099-DIVIDENDS (or year-end totals)	\$ _____
4. Total <b>Box 1</b> of all 1099-R Pension/Retirement	\$ _____
5. Total <b>Box 5</b> of 1099-SSA Social Security	\$ _____
6a. Total <b>Boxes 2 or 3</b> of all 1099-MISC <b>Performing Arts</b> Fees/Royalties Income (even if you did not receive a 1099).	\$ _____
6b. Total <b>Box 1</b> of all 1099-NEC <b>Performing Arts</b> Fee Income (even if you did not receive a 1099)	\$ _____
6c. Total <b>Non-Performing Arts</b> Fee Income (even if you did not receive a 1099) What was the business? _____	\$ _____
7. Total <b>Box 1</b> of 1099-G – Unemployment	\$ _____
8. Total of <b>1099-B Sales</b> of Investments – Must have entire 1099 Brokerage Statement to find cost basis. (Sales of Stocks, Bonds, Mutual Funds, etc. - your brokerage statement has the information)	\$ _____
9. Total Alimony Received	\$ _____
10. Total State Refunds received in 2024 from any year(s)	\$ _____
11. Total Jury Duty, Election Pay, Gambling Winnings, Prizes, Other	\$ _____
<b>TOTAL OF THE ABOVE INCOME ITEMS</b>	<b>\$ _____</b>

If the above total exceeds \$100,000 for Single filers or \$200,000 for Married filers, VITA may not prepare your tax returns this year.