

# VOLUNTEER INCOME TAX ASSISTANCE (VITA)



The Volunteer Income Tax Assistance (VITA) program provides free income tax return preparation and electronic filing for individuals and families who make less than \$52,000 a year. Both state and federal tax returns are prepared by IRS trained and certified community volunteers.

**When is the VITA site open?** In-person tax assistance is available at HRDC and MSU-B during the tax season (late January to mid-April). During the rest of the year, the site operates on a limited appointment-only basis. Call (406) 247-4760 to make an appointment.

**What do I need to bring?** You must bring the following items or you will not be able to complete your tax return at the VITA site.

- Actual Social Security cards for taxpayer, spouse, and all dependents.
- A valid picture ID for taxpayer and spouse.
- All tax documents and forms issued for the tax year, including: Forms W-2, 1098, 1099, and K-1 and dependent care amount spent with provider EIN.
- Last year's tax return.
- Check statement or blank check; savings account number

**I haven't filed a tax return for a few years. Can you do past-year taxes?** Yes. Our site is equipped to prepare tax returns for the past two tax seasons.

**What are my options for receiving my refund, and how soon can I expect it?** You can either have your" refund direct deposited into a bank account or have it mailed to you as a check. Direct deposits typically arrive in 10-14 days while paper checks take an additional 1-2 weeks. For direct deposit, you must bring your routing number and account number to the tax site (typically, as a blank check).

\*Please note: there will be a delay in receiving refunds until 2/15/17 if you claim the Earned Income Tax Credit.

**Can you prepare other (non-Montana) state tax returns?** Yes. We are able to prepare and file returns for any state in which you had income or residency during the tax year.

**None of HRDC's VITA site times work with my schedule. Are there other sites that might help me?** Yes. Go to [www.montanafreefile.org](http://www.montanafreefile.org) to find other free, local tax site locations and times.

**I made more than \$54,000 last year (or otherwise don't don't meet the site guidelines). Can HRDC still help me?**

Taxpayers whose tax situation falls outside VITA's guidelines will be able to use site resources to prepare and file their own tax return electronically, using the IRS' free online services. VITA volunteers will be available to provide limited filing assistance and to direct you to appropriate tax resources.

**What kind of returns cannot be prepared at a VITA site?**

- Farm income
- Rental income
- Business income with more than \$10,000 in expenses or a net loss for the year, or had inventory, employees, depreciation or business use of home expenses.
- Deduction of loss due to casualty or theft
- Deduction of non-cash charitable contributions over \$500
- Adoption expenses credit
- Moving expenses deduction
- Alternative fuel/plug-in vehicle credit

## For more information

Web: [www.hrdc7.org](http://www.hrdc7.org)  
Phone: 406-247-4710 or 800-433-1411  
Email: [info@hrdc7.org](mailto:info@hrdc7.org)

The VITA program is sponsored by the Internal Revenue Service and supported by local organizations including United Way of Yellowstone County, Montana Credit Unions for Community Development, Montana State University Billings, Parnly Billings Library, and AmeriCorps VISTA.



District 7 HRDC is a private nonprofit Community Action Agency dedicated to the promotion of self-sufficiency and alleviation of poverty. HRDC offers many resources for you, for your family, and for your home, all in the name of helping people move forward. To learn more, visit [www.hrdc7.org](http://www.hrdc7.org) or call 406-247-4732 for more information about how we can help you.

**District 7 Human Resources Development Council**  
Big Horn, Carbon, Stillwater, Sweet Grass and Yellowstone Counties of Montana

7 North 31st Street, PO Box 2016, Billings, MT 59103  
[www.hrdc7.org](http://www.hrdc7.org) | office 406.247.4732 | fax 406.248.2943