Tax Assistance Information

Thank you for your interest in the free tax assistance provided by Ohio Benefit Bank (OBB) and IRS VITA (volunteers in tax assistance). If you have scheduled an appointment, please review the information on page 2.

Before you schedule if you answer YES to any of the following,
you must have your taxes prepared by a VITA tax counselor.

a. Total household income for 2011 over $60,000?
b. Have capital gains/losses
c. Receive income from rental or agricultural properties
d. Member of the clergy
e. If you have self-employment, own your own business, you need to file a Schedule C

If you answered NO, (none of the above applies to you),
you may schedule an appointment for EITHER OBB or VITA.

Sites and Scheduling information

Hancock Co. Public Library – VITA - Walk Ins and scheduled appointments (dial 2-1-1 or 1-800-650-4357)
Tax Clinics at Millstream – OBB Appointment Only (dial 2-1-1 or 1-800-650-4357)
Hope House – OBB (dial 2-1-1 or 1-800-650-4357)
Arcadia, McComb, Arlington Schools – OBB (dial 2-1-1 or 1-800-650-4357)
Agency on Aging – VITA Only – 419-423-8496
Tall Timbers Businesses – OBB Contact Pam Broadman 419-425-4906x36

See next page for required documentation to complete your taxes.

List also available at on the following websites:
uwhancock.org
findlayhopehouse.org
hancockseniors.org
hhwpcac.org
findlay.lib.oh.us

Frequently Asked Questions and Required Documentation

What if I need my previous year's tax return completed?

OBB can help prepare previous taxes up to 3 years, but they cannot do amendments.
Hancock County VITA sites can also prepare previous tax returns and can do amendments

I don't have my W2(s) can I file with my last pay stub?

All clients must have their earning statement(s) from all employers in 2011. Our sites cannot prepare taxes using paycheck stubs. If client does not have required documentation, they can still get their taxes prepared for free, but they must call the IRS helpline at 1-800-829-1040 to find out how to obtain replacement documents.

What do I need to bring with me?

Required Documentation

- Proof of identification or photo ID*
- Social Security Cards for you, or spouse and dependents and/or a social security number verification letter issued by the Social Security Administration*
- Wage and earning statement(s) (Form W-2; W-2G; 1099-R) from **ALL** 2011 employers*
- Birthdates for you, your spouse and dependents on the tax return*
- Proof of bank account routing numbers and account numbers for Direct Deposit, such as a blank check (7 to 10 business days for direct deposit) U.S. Mail option available
- Copy of 2010 federal and state returns, if available
- Interest and dividend statements from banks (Form 1099)
- Total paid for daycare provider and the daycare provider's tax identifying number (the provider's Social Security Number or the provider's business Employer Identification Number)
- To file taxes electronically on a married-filing-joint tax return, ***both spouses must be present to sign the required forms***

If you do NOT have required documentation, you will need to reschedule your appointment

If any of the following apply to you, also bring documentation for:

- Divorce papers
- Alimony paid or received
- Any notices from the IRS or state tax office
- Child care expenses, including the provider's address and federal ID number
- College tuition and student loan interest statements
- Mortgage company statements
- Property tax bills

Additional forms of income such as:
Lottery/gambling winnings
Prizes and awards
Scholarships and fellowships