

Filing your taxes
is complicated.

LET THE LIBRARY AND OUR VOLUNTEERS HELP!



Tax Documentation available at all Greene County Public Libraries

As a community service, all Greene County Public Libraries are distribution points for Ohio State Tax instructions and Federal Tax 1040 instructions and forms. State tax packets and other Federal forms may be requested and mailed to your home through tax.ohio.gov/individual/get-a-form and [IRS.gov](https://irs.gov) respectively. **Your library can print forms for you for \$.15 a page.**



Volunteer Income Tax Assistance at the Xenia Community Center (new location!)

The Volunteer Income Tax Assistance (VITA) staff will be offering **in-person tax APPOINTMENTS at the Xenia Community Center** (1265 W 2nd St, Xenia, OH) from January 26 through April 12, 2024. Please call 937-352-4000 (option 3) or visit the Xenia Community Library to schedule your in-person tax appointment with our VITA staff. *The tax return appointment is limited to no more than two people per return.*

Appointments are available:

- Mondays from 10am to 3pm
- Tuesdays from 10am to 3pm
- Fridays from 10am to 3pm



PLEASE NOTE: If you would like to have the VITA staff assist you at the Xenia Community Center you **MUST BRING THE DOCUMENTATION LISTED ON THE BACK OF THIS CARD TO YOUR APPOINTMENT.**



Please bring these documents to your VITA appointment:

- ☐ Social security cards for everyone in the family: **no exceptions.**
- ☐ Photo ID for the Taxpayer and Spouse. A current Ohio Driver's License is preferred but employer ID cards with a photo, military ID, state ID card, and passport are also acceptable.
- ☐ All of your W-2 forms from **all** of the jobs you worked from the beginning of 2023 through the end of the year.
- ☐ Unemployment received in 2023 (1099-G). You can log into your online account and print your statement – please print your statement **PRIOR** to your appointment.
- ☐ Social Security statements (1099-SSA).
- ☐ All 1099-NEC (non-employee compensation) income forms if self-employed, and any other source of cash income.
- ☐ If self-employed, have your business expenses documented, totaled, and available at your appointment.
- ☐ If you have a health savings account (HSA), you must have your 1099-SA form if you took money out of the account last year.
- ☐ If you have insurance through the Marketplace (ACA/ Obamacare), you must bring your 1095-A form.
- ☐ Bring documentation related to your out-of-pocket health expenses. This includes your year-end pharmacy statement, co-pays for medical expenses, dental expenses, eye expenses, hearing aids, and medical health insurance (including dental and eye) and long term care (LTC) premiums.
- ☐ If you have children under the age of 13 and paid for childcare expenses while you worked or looked for work, bring your childcare provider receipt. It **must** contain the SSN or EIN of the person or organization caring for your child(ren), the provider's name and address, and the amount you paid for such care itemized for each child.
- ☐ If you have a brokerage account, you must wait for your 1099-B forms. *These forms often do not arrive before March so please **do not schedule your tax preparation appointment before March 15, 2024.***
- ☐ If a member of your household attended college/university and received a Form 1098-T with tuition and scholarship information, you must provide a school account statement for the year showing all college charges and payments.
- ☐ Your bank's routing number and account number if you want your refund to be direct-deposited. *Your debit card or payroll card does not have the information needed for direct-deposit so you may need to call your bank to get the required information in advance of your appointment.*
- ☐ Please bring your 2022 tax return. If you did not file a tax return for 2022 and need to do so, bring **ALL** of your 2022 tax documents as noted above in order to file a 2022 tax return.
- ☐ Bring any letters received from the IRS, the state of Ohio, or the School District received in 2023.

Hardcopy/paper forms are required for tax preparation. If you do not have a paper copy of your tax statements, please see the Xenia Community Library staff for assistance with printing a copy of your forms **BEFORE coming to your appointment.**