

FREE TAX PREPARATION AT HACIENDA CDC

By Appointment Only:

Thursday February 15th, 2018

Thursday March 8th, 2018

Thursday April 5th, 2018

5 pm – 9pm



Please call to schedule your appointment slot ASAP as we have limited space.
Come at least 15 minutes before the appointment.

503-961-6432 (call between 9am-5pm)

6700 NE Killingsworth St, Portland, OR 97218

www.haciendacdc.org

For information on other sites, call 211info 2-1-1 or 1-866-698-6155.
Or visit our Web site at www.cashoregon.org

What You Need to Bring?

- **Valid photo ID** for you (and spouse if present).
- **Taxpayer Identification Number** for you, your spouse and dependents. This includes originals or photocopies of social security or ITIN cards, Medicare cards with the letter "A" after the social security number, social security or ITIN letters.
- **Proof of income**, such as:
 - All W-2's or 1099's
 - Statements for self-employed earnings, prizes, scholarships, gambling winnings
- **Health Insurance Statements:** Forms 1095-A, B or C, Affordable Health Care Statements
- **Last year's tax return**
- **Checking and Savings Account Information**, routing and account numbers for direct deposit such as a voided check - refunds are a great time to save!
- **Other Common Deductions.** Bring all that apply:
 - **Child care expenses** (provider's name, address, phone number, tax ID#, amounts spent)
 - **Homeowners** (mortgage and property tax statements)
 - **Education** (1098-T, 1098-E, receipts of expenses, OR-529 contributions)
 - **Alimony** (paid or received)
 - **Medical Expenses** (deductible in limited circumstances, bring receipts or amounts)
 - **Charitable Donations**
 - **Retirement Plan Contributions** (IRA, 401k, or others)
 - **Notices (IRS, Oregon Dept. of Revenue, Health Insurance Marketplace notices, or other that says "Important Tax Document")**

Frequently Asked Questions:

How will the Affordable Care Act affect my taxes?

The Affordable Care Act requires many taxpayers to have healthcare coverage. If you or your dependent did not have coverage, you may qualify for an exemption. Your tax counselor will work with you to find answers for your specific situation.

What if I owe money and I cannot pay?

Ask your Tax Counselor about requesting a payment plan. For further assistance with tax debt and other IRS concerns ask for information on Low Income Taxpayer Clinics.

What if I have income from a state other than Oregon?

We can prepare your federal return. We can prepare other states in limited circumstances. Ask us what states we can prepare. Washington state does not require a state return.

What if I don't have a Social Security Number?

If you don't qualify for a SSN, and need to file a tax return, we can help you apply for an Individual Taxpayer Identification Number (ITIN).

What if I have a small business, am self-employed, or an independent contractor? We may be able to help if you have the following:

- Less than \$25,000 in expenses
- A profit, not a loss for the year
- No inventory at any time during the year
- No employees, depreciation or amortization. No section 179 expensing in lieu of depreciation
- No deduction for expenses for business use of the home
- Only standard mileage (actual costs not allowed)
- Very limited rental income situations

Can you prepare or amend a tax return from a past year?

No, not at this event but we can connect you to CASH OR who does during March and on selected days, May through October 2018.

What if I've bought and sold stocks or mutual funds in the past year?

We can help you with simple stock transactions if you have all the documentation. Bring your 1099-B if you sold stocks or bonds. You need to know the purchase date and price of each stock, or mutual fund you sold.

Some tax returns that we cannot prepare:

There are a variety of situations where we are unable to prepare the tax return because our volunteers are not trained on the issue. A few of these situations include:

- Self-employed health insurance
- Vehicle donations
- Farm income
- 1098-T with amounts listed in Box 4
- Schedule E rental property with expenses
- Minor's investment income, and other complex issues

Please use this flyer as a guide. We will make every effort to complete returns that fall within the guidelines and training volunteers receive.