

PLAN

WHAT TO BRING:

- A valid photo ID for you and your spouse (if married filing jointly). For married filing jointly, both spouses must be present.
- Social Security cards or ITIN notices/cards for **all individuals** on tax return
- Birthdates for **all individuals** on tax return
- All Forms W-2, 1099, and information for any other income
- Information for all deductions and credits
- Form 1095-A, B or C (ACA statements) from insurer
- Total paid to child care provider and their tax ID number
- Copy of prior year tax return
- Proof of account for refund direct deposit or proof of account for electronic funds withdrawal

All sites listed offer **FREE** tax prep **and** electronic filing for basic returns.

SITES WILL NOT PREPARE:

- Schedule C with losses
- Complicated Schedule D
- Schedules E or F
- Forms SS-5 and SS-8
- Parts 4 & 5 of Form 8962
- Any income tax returns beyond the volunteer's certification

Please see a professional preparer for assistance with complicated returns.

Don't miss out on Federal and State tax credits that **YOU** may qualify for.

FEDERAL

- Earned Income Tax Credit (EITC)
- Child Tax Credit (CTC)
- Child and Dependent Care Credit
- Credit for Other Dependents
- Lifetime Learning Credit
- Retirement Savings Credit
- American Opportunity Credit

For information on federal tax credits and programs, go to www.irs.gov or call toll-free 800-829-1040. For local assistance, call 844-545-5640.

STATE

- Elderly Homeowner/Renter Tax Credit

- Earned Income Tax Credit (EITC)

For information on state tax credits and programs, go to: MTRevenue.gov or call (406) 444-6900.



Of The Lewis & Clark Area

75 E. Lyndale, Helena, MT 59601
(406) 442-4360
www.unitedwaylca.org
www.facebook.com/uwlca

FREE Tax Help



Get your basic taxes filed electronically by IRS-Certified volunteers at community organizations you know and trust.



FAST

FREE

TRUSTED

LOCAL

INFO BROUGHT TO YOU BY



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AARP Foundation

TAX-AIDE

Free tax assistance for those who need it most



Tax Issues?



Montana Legal Services Association (MLSA)
Low Income Taxpayer Clinic assists
with income tax disputes year-round:
www.mtlsa.org or 800-666-6899.

IRS-Specific Issues?



Local Taxpayer Advocate Services assist with
federal income tax issues year-round:
406-444-8668.

FOR MORE FREE TAX HELP
INFORMATION, VISIT:
www.montanafreefile.org

Option 1: APPOINTMENTS

HELENA SENIOR CENTER

Location: 200 S. Cruse Ave.

Call: 406-457-7301

Dates: Every Thursday, 9 a.m.
to 12 p.m.

Feb. 6 to April 9, 2020

Preference given to those 60+



ROCKY MOUNTAIN DEVELOPMENT COUNCIL

Location: 200 S. Cruse Ave.

Call: 406-457-7301

Dates: Every Saturday, 9 a.m. to 12 p.m.

Feb. 1 to April 11, 2020

EAST HELENA UNITED METHODIST CHURCH

Location: 50 Prickly Pear Ave., E. Helena

Call: 800-823-1323

Dates: Feb. 5 and March 4 and 11, 2020,
10 a.m. to 3 p.m.

Option 3: ONLINE

Do your taxes from the comfort of your
home for FREE.

www.unitedway.org/myfreetaxes

Brought to you by
United Way Worldwide

Option 2: WALK-IN

GOOD SAMARITAN THRIFT STORE



Location: 3067 N. Montana Ave,

Call: 406-442-0780

Dates: Every Monday and Thursday,
Feb. 3 to April 13, 2020, 10 a.m. to 4 p.m.

HELENA COLLEGE



Location: 1115 N. Roberts St.

Call: 800-823-1323

Dates: Every Saturday,
Feb. 1 to April 11, 2020, 9 a.m. to 1 p.m.

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