

**FREE**

**TAX PREPARATION**



- ◆ Free tax preparation services for low and moderate individuals and households provided by IRS certified volunteers
- ◆ Visit our website [phoenix.gov/eitc](http://phoenix.gov/eitc) to schedule an appointment to see if you qualify for drop off services
- ◆ Visit the website to download your intake packet
- ◆ Fill out the forms and bring them to your appointment, including all required tax documents
- ◆ A second appointment to pick up your completed tax return and documents will be scheduled the following week
- ◆ Services provided at our VITA sites are **BY APPOINTMENT ONLY**

### ✔ **WHAT TO BRING TO YOUR APPOINTMENT**

- ◆ Government issued photo ID. If married, for both spouses
- ◆ Social Security cards for you, your spouse and dependents or an Individual Taxpayer Identification Number (ITIN) letter
- ◆ Proof of all income, including W-2, 1099-R, and SSA-1099
- ◆ Unemployment benefits statement (Form 1099-G)
- ◆ Interest and dividend statements (Forms 1099-INT and 1095-DIV)
- ◆ Information for all other income, including self-employment
- ◆ Information for all deductions (summarized)
- ◆ Form 1095-A for health insurance through Marketplace (if applicable)
- ◆ Bank routing and account number for direct deposit
- ◆ A copy of last year's tax return, if available
- ◆ To file taxes electronically on a married-filing-joint tax return, both spouses must sign the required forms

Schedule your eligibility phone screening appointment on our website [phoenix.gov/eitc](http://phoenix.gov/eitc)

If you have any questions, please call 602-534-8359



Don't have time to come to one of our locations?

- ◆ Use our free online software, there are no income limitations. Send us an email to receive the tax preparation software link and instructions
- ◆ VITA Volunteers will be available to answer basic tax law questions

If you are interested in Do-It-Yourself tax filing, please email [vita.taxhelp@phoenix.gov](mailto:vita.taxhelp@phoenix.gov) for more information or visit website: [phoenix.gov/eitc](http://phoenix.gov/eitc)



## Mesa United Way VITA Program 2020-21 Tax Season VITA Sites



**INCOME LIMIT - INCOME MUST BE LESS THAN \$57,000 TO QUALIFY FOR THIS FREE SERVICE**

**Find us at... <https://www.mesaunitedway.org/volunteer-income-tax-assistance/>**

**At ALL VITA Sites: MUST wear a face mask covering mouth and nose. Social Distancing must be maintained. Children/additional people (not required for tax preparation service) are NOT ALLOWED at the sites.**

| Site  | Site Address / Appointment Link  | Days & Hours for Drop-Off *                           | Dates *   |
|---|--|---|---|
| Salvation Army Mesa                                     | 241 E 6th Street<br>Mesa, AZ 85201<br><a href="https://sam-vita-site.bookafy.com/">https://sam-vita-site.bookafy.com/</a>            | Monday & Thursday:<br>6 PM - 9 PM                     | Feb 1 - Apr 12, 2021<br><a href="#">Appointment ONLY Site</a><br><a href="#">Closed Feb 15</a>  |
| First Credit Union                                      | 25 S Arizona Place #111<br>Chandler, AZ 85225<br><a href="https://fcu-vita-site.bookafy.com/">https://fcu-vita-site.bookafy.com/</a> | Tuesday:<br>9 AM - 1 PM                               | Feb 2 - Apr 13, 2021<br><a href="#">Appointment ONLY Site</a>   |
| EVIT Main Campus  | 1601 W Main Street<br>Mesa, AZ 85201<br><a href="https://evit-vita-site.bookafy.com/">https://evit-vita-site.bookafy.com/</a>        | Tuesday & Thursday: 6 - 9 PM<br>Saturday: 9 AM - 1 PM | Jan 30 - Apr 13, 2021<br><a href="#">Appointment ONLY Site</a>  |
| Red Mountain Library                                    | 635 N Power Road<br>Mesa, AZ 85205<br><a href="https://rmlib-vita-site.bookafy.com/">https://rmlib-vita-site.bookafy.com/</a>        | Tuesday though Friday:<br>10 AM - 3 PM                | Jan 26 - Apr 14, 2021<br><a href="#">Appointment ONLY Site</a><br><a href="#">Closed Apr 2</a>  |
| Salvation Army<br>Chandler                              | 85 E Saragosa Street<br>Chandler, AZ 85225<br><a href="https://sac-vita-site.bookafy.com/">https://sac-vita-site.bookafy.com/</a>    | Tuesday & Thursday:<br>6 - 9 PM                       | Feb 2 - Apr 13, 2021<br><a href="#">Appointment ONLY Site</a>   |
| Mesa Community<br>Action Network -<br>MCAN (A New Leaf) | 635 E Broadway Road<br>Mesa, AZ 85204<br><a href="https://mcan-vita-site.bookafy.com/">https://mcan-vita-site.bookafy.com/</a>       | Friday & Selected Saturdays:<br>9 AM - 1 PM           | Jan 29 - Apr 10, 2021<br><b>Saturday ONLY on Feb 6, Mar 13, Apr 10</b><br><a href="#">Appointment ONLY Site</a><br><a href="#">Closed Apr 2</a> |
| Chandler CARE Center                                    | 777 E Galveston Street<br>Chandler, AZ 85225<br><a href="https://ccc-vita-site.bookafy.com/">https://ccc-vita-site.bookafy.com/</a>  | Friday: 12 Noon - 4 PM<br>Saturday: 9 AM - 12 Noon    | Jan 29 - Apr 10, 2021<br><a href="#">Appointment ONLY Site</a><br><a href="#">Closed Feb 13, Mar 13-20, Apr 2-3</a>                             |

\* Subject to Day/Time change and additional/early closures due to unforeseen circumstances and without any prior notice.

**Expected turn-around time for VITA Drop Off Tax Preparation Service is 7-10 days**

**Please be respectful and courteous to VITA VOLUNTEERS**

**We reserve the right to REFUSE SERVICE and will accept clients by APPOINTMENT ONLY.**

**Steps to follow for using the VITA Drop-Off Service:**

- 1 Reserve your appointment at one of the "Appointment Link"s under the site addresses in the chart. Or you can go to <https://www.mesaunitedway.org/volunteer-income-tax-assistance/> to see all of the active sites. You can also download the Intake and Consent forms and fill them out before you come to the site. This is highly recommended!
- 2 Sign-In at the site and completely fill out the Intake Sheet (3 pages) **in your car** or assigned waiting area (if you did not fill them out in advance). **Maximum 15 minutes are allowed for this 'Drop-Off' meeting with a VITA Volunteer.**
- 3 Sign the (4) Consent forms and ensure ALL the required tax documents are **open and out of the envelopes** BEFORE coming to see a Volunteer. **Social Security Card or ITIN Card/Letter** (for ALL persons), **Picture ID** (for Taxpayer and Spouse) **AND Prior year's tax return** (if available).
- 4 If you have itemized deductions, expenses or mileage for self employment... please calculate to the totals for each category before you come to the site. It is your responsibility to provide the totals to us.
- 5 Tax Preparation will be done remotely and the customer will be contacted by phone to collect any incomplete or additional information required during the preparation/review process. Please answer our calls!
- 6 Taxpayer will be given **an appointment** for the completed 'Tax Return Pick-Up'. **Taxpayer and the spouse, BOTH MUST be present** for this meeting. **Maximum 10 minutes are allowed for the "Pick-Up" appointment.**

To find Information on VITA Site Locations in other areas (Phoenix, Tempe, West Valley etc), please visit  
<https://irs.treasury.gov/freetaxprep/>

# Mesa United Way VITA Program

## Tax Return Drop-off/Pick-up Program

**Free tax return preparation services are being provided at multiple locations in the East Valley:**  
For more information -> <https://www.mesaunitedway.org/volunteer-income-tax-assistance/>

Please note the following procedures and restrictions.

**Appointments Required for ALL services** – There are three ways to schedule an appointment.

1. Schedule yourself at one of the **VITA sites on the MUW website** (preferred)
2. Email [vita@mesaunitedway.org](mailto:vita@mesaunitedway.org) for an appointment
3. Call **480-834-2122** - Please leave only one message.

Your call/email will be returned as soon as possible. It may be one or two days. Please **arrive on time** for your scheduled appointment. Only a limited number of people may be allowed in the office at one time.

**Office Rules** - based on concerns regarding the spread of the coronavirus (COVID-19).

1. **Face masks** (covering mouth and nose) must be worn in the office at all times. All clients are expected to provide their own masks.
2. **Social distancing** (6 ft. apart) must be maintained at all times.
3. **Maximum of 2 people** – please do not bring children to the tax appointment.
4. **Anyone experiencing any signs or symptoms of any illness must stay home.**

**Tax Return Drop-off** – During your visit you will fill out several forms and sign a document confirming that you are leaving your tax information for preparation. You must bring your picture ID, SS card, and all tax information including (but not limited to) W2s, 1099's, 1098's, detailed expenses (for self employment) etc. We can provide a more detailed list upon request. Please bring your previous year's tax return if possible.

An experienced tax preparer who will go over all of your information with you and answer any questions you may have. You will leave all of your tax documents with MUW. This meeting should take approximately 15 minutes. Additional time may be required for complicated returns or multiple years.

**Advanced Pickup of VITA Documents** – You can save time by please filling out the required VITA client documents in advance of your Drop-off meeting. Request by email to [vita@mesaunitedway.org](mailto:vita@mesaunitedway.org), pick up a packet from the site, or download them at [www.mesaunitedway.org/volunteer-income-tax-assistance](http://www.mesaunitedway.org/volunteer-income-tax-assistance)

**Tax Preparation** – MUW volunteers will prepare your tax return(s), generally within 7-10 days. You may be called if there are any questions that come up... so please answer your telephone calls. You will be contacted with your pickup time and date after your return is completed or it may be scheduled when you drop-off.

**Tax Return Pick-up** – You will return on your scheduled date and time to pick-up your completed return. We will review your finished returns with you and answer any questions you may have. After you sign your return(s) you will receive a copy for your files. All original documents will be returned to you.

**Tax Return Filing** - We will e-file your returns or you will mail in your returns (if over three years old). We will contact you only if your return is rejected by the IRS or state after they are submitted.



<https://www.turnanewleaf.org/services/financial-empowerment/vita-program.html>

**At ALL VITA Sites: MUST wear a face mask ALWAYS covering nose and mouth. Social Distancing must be maintained. Bring your own pens. Children/additional people (not required for tax preparation service) are NOT ALLOWED at the sites.**

| Site   | Site Address   | Days & Hours for Drop-Off *  | Dates *   |
|--|--|--|---|
| A New Leaf VITA Office<br><b>Appointment ONLY Site</b><br><b>ALL Drop-Off Appointments must be scheduled at:</b>       | 8802 N. 61st Avenue, Glendale,<br>AZ 85302 # (602) 842-2666<br><a href="https://calendly.com/vitaanlglendale/tax-documents-drop-off-appointment">https://calendly.com/vitaanlglendale/tax-documents-drop-off-appointment</a> | Tuesdays:<br>10 am - 11:30 am  | Tuesdays<br>Feb. 9 - Apr. 13, 2021  |
| ACH Avondale Resource Center<br><b>Appointment ONLY Site</b><br><b>ALL Drop-Off Appointments must be scheduled at:</b> | 995 E. Riley Drive, Avondale,<br>AZ 85323 # (623) 282-4708<br><a href="https://calendly.com/vitaavondalerc/15min">https://calendly.com/vitaavondalerc/15min</a>  | Tuesdays: 2 pm - 4 pm<br>Saturdays: 8:30 am - 10:30 am                   | Tuesdays: Feb. 9 - Apr. 13, 2021<br>Saturdays: Feb. 13 - Apr. 10, 2021                                    |
| Citadel of Praise Church<br><b>Appointment ONLY Site</b><br><b>ALL Drop-Off Appointments must be scheduled at:</b>     | 8738 W. Cholla Street, Peoria,<br>AZ 85345 # (602) 351-5873<br><a href="https://calendly.com/vitacop/15min">https://calendly.com/vitacop/15min</a>   | Saturdays:<br>9 am - 11 am   | Saturdays<br>Feb. 13 - Apr. 10, 2021  |
| Buckeye Valley Chamber of Commerce<br><b>(Walk-In Site for Drop-Off)</b>   | 508 E Monroe Ave.,<br>Buckeye, AZ 85326  | Wednesdays:<br>2 pm - 5 pm   | Wednesdays<br>Feb. 10 - Apr. 14, 2021   |
| Littleton Elementary School District<br>Office<br><b>(Walk-In Site for Drop-Off)</b>                                   | <b>Family Welcome Center</b><br>1642 S. 107th Avenue,<br>Avondale, AZ 85323  | Thursdays:<br>4 pm - 6 pm  | Thursdays<br>Feb. 11 - Apr. 15, 2021  |
| Riverboat Bingo<br><b>(Walk-In Site for Drop-Off)</b>  | 18300 W. Bell Road<br>Surprise, AZ 85374   | Wednesdays:<br>11 am - 1:30 pm   | Wednesdays<br>Feb. 10 - Apr. 14, 2021   |
| Surprise Resource Center<br><b>(Walk-In Site for Drop-Off)</b><br><b>Closed on Monday, Feb. 15th</b>                   | 12425 W. Bell Road<br><b>Bldg. A, Suite # 124</b><br>Surprise, AZ 85378  | Mondays: 4 pm - 6 pm<br>Tuesdays: 4 pm - 6 pm<br>Thursdays: 9 am - 11 am | Mondays: Feb. 8 - Apr. 12, 2021<br>Tuesdays: Feb. 9 - Apr. 13, 2021<br>Thursdays: Feb. 11 - Apr. 15, 2021 |

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**Expected turn-around time for VITA Drop Off Tax Preparation Service is 7-10 days**  
Tax Preparation service will be provided by IRS certified volunteers on First Come First Serve basis.  
**Please be respectful and courteous to VITA VOLUNTEERS**  
We reserve the right to REFUSE SERVICE and to stop taking clients BEFORE the site close time.

**Steps to follow for using the VITA Drop-Off Service:**

|   |  |
|---|--|
| 1 | Reserve your appointment at one of the "Appointment Link"s under the site address in the list above OR you can go to <a href="https://www.turnanewleaf.org/services/financial-empowerment/vita-program.html">https://www.turnanewleaf.org/services/financial-empowerment/vita-program.html</a> Or <b>Walk-In at the specified sites.</b> You can also download the Intake Packet (English or Spanish) and fill it out before you come to the site. This is highly recommended! |
| 2 | Sign-In at the site and completely fill out the Intake Sheet (3 pages) <b>in your car</b> /assigned waiting spots (if available). You will be called on your cell when it's your turn to Drop-Off your tax documents. <b>Maximum 15 minutes are allowed for this 'Drop-Off' meeting with a VITA Volunteer.</b>   |
| 3 | Sign the (4) Consent forms and ensure ALL the required tax documents are <b>open and out of the envelopes</b> BEFORE coming to see a Volunteer. <b>MUST</b> bring <b>Social Security Card or ITIN Card/Letter</b> (for ALL persons), <b>Picture ID</b> (for Taxpayer and Spouse) <b>AND Prior year's tax return</b> .  |
| 4 | Tax Preparation will be done remotely and the customer will be contacted via phone or email to collect any incomplete or additional information required during the preparation/review process.  |
| 5 | Taxpayer will be given an <b>appointment</b> for the completed 'Tax Return Pick-Up'. <b>Taxpayer and the spouse, BOTH MUST be present</b> for this meeting. <b>Maximum 10 minutes are allowed for the "Pick-Up" appointment.</b>   |

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