

## Free tax preparation by volunteers trained and certified by the IRS

- All appointments will be in-person with a certified volunteer tax preparer who will prepare your return with you.
- **BRING PAPER DOCUMENTS, WE CANNOT ACCESS DOCUMENTS ON YOUR PHONE.**
- Please do **not bring children** with you to your appointment.

**The best way** to make an  
**appointment is online.**

Schedule your appointment online:  
<https://dane.extension.wisc.edu/the-richard-dilley-tax-center/>

Or Google: Richard Dilley Tax Center

If you are unable to sign up online, call  
**(608) 283-1261**. You may have to call  
multiple times due to high call volumes.  
**Monday-Friday 8:00am-4:30pm**

An EEO/AA employer, University of Wisconsin-Madison Division of Extension provides equal opportunities in employment and programming, including Title VI, Title IX, the Americans with Disabilities Act (ADA) and Section 504 of the Rehabilitation Act requirements.

  
South Madison Partnership  
UNIVERSITY OF WISCONSIN-MADISON  
2238 S. Park Street  
Madison, WI 53713



Richard Dilley Tax Center  
Volunteer Income Tax  
Assistance (VITA) Site prioritizes  
low-income individuals and  
families, older adults, those  
with Limited English, and  
people with disabilities.

The site is supported by:



## Richard Dilley Tax Center 2024



**January 29 – April 15**  
**BY APPOINTMENT ONLY!**

Mondays: 9 am – 3 pm  
Fridays: 1 pm – 5 pm  
Saturdays: 9 am – 3 pm

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# TO FILE, YOU WILL NEED TO BRING



✓ **A PICTURE ID**

✓ **PRINTED / PAPER DOCUMENTS** (not on phones/laptops)

✓ **Social Security Cards, ITIN forms, or SSA-1099 for you and all dependents, spouse**, if filing jointly . . . NO EXCEPTIONS!  
 • SA-1099 is benefit statement for older adults getting social security, it must show name and full number from Social Security office

✓ Completed **INTAKE FORM**, IRS Form 13614-C, filled out to the best of your ability  
 • You are not required complete the intake form in advance, but the process will be faster if you come with it filled out  
 • Pick up form: 2238 S Park St Madison WI 53713 OR 5201 Fen Oak Dr. Suite 138 Madison WI 53718  
 • Electronic link to print intake form to bring with you  
   ◦ English: <https://www.irs.gov/pub/irs-pdf/f13614c.pdf>  
   ◦ Espanola: <https://www.irs.gov/pub/irs-pdf/f13614cs.pdf>

✓ Income Statements, such as:  
 • Wage statements—Form(s) W-2  
 • Pension and Social Security Statements- Form(s) 1099R and SSA-1099  
 • 1099G: Unemployment

✓ All 2023 Financial Statements, such as:  
 • Interest and dividends statements—Form(s) 1099INT and 1099DIV  
 • Mortgage interest statements—Form(s) 1098  
 • Tuition payments statements—Form(s) 1098T

✓ Copy of tax returns from 2022, if available

✓ A record of any estimated tax payments made for the 2023 tax year

✓ Affordable Care Act (ACA) Health Insurance Marketplace statement—Form(s) 1095A – this is required if you had Marketplace Insurance at any time during 2023

✓ Information for all other deductions/credits

✓ Bank account information (account and routing number) for direct deposit of your refund

✓ Completed Rent Certificate, signed by the Landlord/Management Company OR Copy of 2023 Property Tax bill, if applying for Homestead

## TYPES OF RETURNS WE DO NOT DO:

- ✗ Married filing separately
- ✗ People divorced in 2023
- ✗ People who sold CRYPTO or BITCOIN or VIRTUAL CURRENCY
- ✗ Business with one of the following:  
inventory, expenses over \$5000, employees, depreciation, shows a loss
- ✗ International Students here on a VISA (J-1, F-1, etc.)
- ✗ People who immigrated to the USA in 2023- you must have lived in USA for all of 2023
- ✗ More than two W2G's from gambling



ASL, language interpretation or other reasonable accommodations are available upon request. These services are free.  
 Please tell us your needs when scheduling appointments.