FREE tax preparation by VITA 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:
dane.uwex.edu/rdtc

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

South Madison Partnership
UNIVERSITY OF WISCONSIN-MADISON

2238 S. Park Street
Madison, WI 53713

Volunteer Income Tax Assistance (VITA) sites prioritize low-income individuals and families, older adults, those with Limited English, and people with disabilities.

Funded by:

IRS
Department of the Treasury
Internal Revenue Service

COUNTY OF DANE WISCONSIN 1839

Wisconsin Department of
Revenue

Volunteer Income Tax Assistance (VITA)

FREE tax preparation

Richard Dilley Tax Center

2238 S. Park Street

January 27 – April 14 2025

BY APPOINTMENT ONLY!

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

Schedule your appointment online:
dane.uwex.edu/rdtc
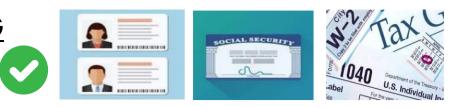Or Google: Richard Dilley Tax Center

SCAN ME

If you are unable to sign up online to make an appointment, call

(608) 283-1261

Monday–Friday
8:00am-4:30pm

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!
- SSA-1099 is a benefit statement for older adults getting social security, it must show name and full number from Social Security office
- ITIN stands for Individual Tax Identification Number for people filing without a social security number

✓ Completed **INTAKE FORM**, IRS Form 13614-C, if possible
- 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: tinyurl.com/rdtc-intake-eng
  - Español: tinyurl.com/rdtc-intake-esp

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

✓ All 2024 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 2023, if available

✓ A record of any estimated tax payments made for the 2024 tax year

✓ Affordable Care Act (ACA) Health Insurance Marketplace statement—
Form(s) 1095A – required if you had Marketplace Insurance any time during 2024

✓ 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 2024 Property Tax bill, if applying for Homestead: https://www.revenue.wi.gov/TaxForms2024/2024-RentCertificatef.pdf

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TYPES OF RETURNS WE DO NOT DO:

❌ Married filing separately

❌ People divorced in 2024

❌ 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 2024- you must have lived in USA for all of 2024

❌ People with 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.

Extension
UNIVERSITY OF WISCONSIN-MADISON
DANE COUNTY