

VITA TAX PREPARATION ELIGIBILITY

Who is eligible for free tax preparation through VITA?

The VITA program offers free tax help to people who make \$60,000 or less, persons with disabilities, the elderly and limited English-speaking taxpayers who need assistance in preparing their own tax returns.

The following returns are ineligible for VITA tax prep services.

- Schedule C with loss, depreciation or business use of home (some self-employed income will be accepted on a limited basis.)
- Complicated Schedule D (capital gains and losses)
- Form SS-5 (request for Social Security Number)
- Form 8606 (non-deductible IRA)
- Form 8814 (child taxed at parent's tax rate)
- Form SS-8 (determination of worker status for purposes of federal employment taxes and income tax withholding)
- Parts 4 & 5 of Form 8962 (allocation of policy amounts, alternative calculation for year of marriage)
- Form W-7 (application for Individual Taxpayer Identification Number (ITIN))
- Returns with casualty/disaster losses
- Rental income
- Military returns
- Foreign student returns
- State returns outside of Illinois and Iowa



Have a question?

Email Monte Schwartz at mschwartz@unitedwayqc.org
or call [563.355.4310](tel:563.355.4310).



[UnitedWayQC.org/VITA](https://www.unitedwayqc.org/VITA)

852 Middle Road, Suite 401 | Bettendorf, IA 52722 | 563.355.4310

