

NSU – Broken Arrow partners with Volunteer Income Tax Assistance (VITA) program to bring tax preparation to community
by NSU Staff

(Broken Arrow, Okla.)—The Northeastern State University – Broken Arrow campus community and members of its surrounding communities will have the option of obtaining free tax preparation through an NSU partnership with the Volunteer Income Tax Assistance (VITA) Program.

For those individuals who qualify as having low-to-moderate income (\$55,000 and below), certified, trained volunteers will be available by appointment to prepare basic tax returns on both the state and federal level.

“Last year the VITA program prepared over 400 tax returns for low to moderate income taxpayers at the Broken Arrow location,” said Justin Halpern, professor of accounting. “The VITA program is one of NSU’s most valuable community services. For many members of our community, their tax refund is the largest amount of cash they receive every year, and VITA makes it possible for them to avoid paying a large amount of their refund to commercial tax preparation services.”

The tax preparation services will begin Jan. 31 and Conclude on April 13th with the exception of Spring Break, March 17-24. The VITA Lab at NSUBA is open on Thursdays from 5:30 – 8:30 and on Saturdays from 9am – 12pm in room 118 of the Library building. Appointments can be made by calling Community Action Resource & Development (CARD) at 918-486-2471. Walk-ins will be served if time permits; however, CARD recommends making an appointment.

Those seeking assistance with tax preparation should come prepared with the following:

- Photo Identification
- Physical copy of Social Security Card for you, your spouse and dependents and/or Social Security Number verification letter issued by the Social Security Administration
- Birth dates of you, your spouse and dependents
- Wage and earnings statements, Form W-2, W-2G, 1099-R, from all employers
- Interest and dividend statements from banks (Form 1099)
- A copy of last year’s Federal and State tax returns, *if available*
- A personal check with your Bank routing number and Account Number for Direct Deposit
- Payment made to day care providers including tax identification number of the day care provider (provider’s Social Security number or business Employer Identification Number)
- All documents issued that state “furnished to the IRS”
- Any documents that deal with health insurance coverage, 1095-A, 1099-SSA, exemption certificates, etc.
- To file taxes electronically for “married filing joint” tax returns, both spouses must be present to sign the required forms.

Also, NSU’s partnership with MyFreeTaxes provides free, online, self-guided federal and state tax preparation for those with income of \$66,000 or less. It is easy, safe and secure. The tax filing software is provided by H&R Block and The United Way at www.myfreetaxes.com for individuals who will be able to access their taxes and returns from anywhere there is internet access. For more information, contact Amber Whisenhunt at 918-449-6517 or at whisen05@nsuok.edu.