

NSU partners with VITA to help community prepare taxes

The Northeastern State University 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. Volunteer efforts will be available at two locations this year, the Broken Arrow campus and the Cherokee Nation in Tahlequah.

Low to moderate income taxpayers (those with incomes of \$60,000 or less) are eligible to take advantage of the service offered at the Broken Arrow campus. Certified, trained volunteers will be available by appointment to prepare basic federal and state tax returns. Trained volunteers will also be available at the Cherokee Nation in Tahlequah to assist individuals with incomes of \$60,000 or less.

In addition, those who would like to file their own taxes online can access the necessary tax software for free. NSU's partnership with MyFreeTaxes provides easy, self-guided federal and state tax preparation for those with incomes of \$66,000 or less. The tax filing software made available by United Way at www.myfreetaxes.com enables individuals who will be able to prepare their tax returns from anywhere there is Internet access.

"Last year the VITA program prepared almost 600 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."

While the central location to receive assistance is at Broken Arrow, the service is not exclusive to those community members.

"VITA is open to anyone who meets the income limitations. We have people coming from all over the Tulsa area, Muskogee, and even Tahlequah," Halpern added. "Also, this year we are sending NSU accounting students to the VITA program at the Cherokee Nation in Tahlequah. Anyone with a qualifying income can take advantage of these services."

The tax preparation services will begin Jan. 31 and conclude on April 14, with the exception of spring break from March 18-24. The VITA Lab on the Broken Arrow campus is open on Wednesdays and Thursdays from 5:30-7:45 p.m. and on Saturdays from 9 a.m.-12 p.m. in Room 118 of the library

building. Appointments are strongly recommended and can be made by calling Community Action (CARD) at 918-486-2471; however, walk-ins will be served if time permits.

The Vita Lab at the Cherokee Nation will be available by appointment. Appointments can be made by calling 918-453-5536. It will be open on Mondays and Tuesdays, from February 5 through April 10th.

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

- Photo proof of 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 for you, your spouse and dependents on the tax return
- Wage and earning 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
- 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 return, both spouses must be present to sign the required forms

For more information, contact Justin Halpern at 918-449-6525 or halpernj@nsuok.edu.