# 2025 Midway Taxpayer Packet and Instructions

## *All Services are Virtual*

Welcome and thank you for reaching out for your tax needs.
The Martin Luther King Sr. Community Resources Collaborative is a proud participant
of the IRS Volunteer Income Tax Assistance (VITA) Program.

### Step 1:

Complete this Taxpayer packet

1. Form 13614-C: Intake/Interview and Quality Review Sheet
2. Form 15080: Consent to Disclose Tax Return Information to VITA/TCE Tax Preparation Sites
3. Form 14446: Virtual VITA/TCE Taxpayer Consent

### Step 2:

Email the packet to midwayvirtualvita@yahoo.com

### Step 3:

A tax preparer will contact you by phone or email in 5-7 Business days
to schedule an appointment for virtual tax prep services

### Step 4:

Tax return will be prepared for the taxpayer

### Step 5:

All taxpayers have to participate in a quality review
before tax return may be submitted to the IRS

### Resources:

For more information or to participate in our free virtual financial classes and training,
please visit our website at https://mlksrcollaborative.everfi-next.net/

## *ALL SERVICES ARE FREE!!!!!*

# WHAT TO HAVE READY

**To ensure your tax preparation moves as fast as possible, please be prepared for your session. Here is the list of items you need to have ready. You will be given instructions on how to submit necessary documents to the tax preparer:**

REQUIRED DOCUMENTS/ITEMS

1. A valid, official photo identification (you and your spouse, if filing jointly) 2. One of the following for you, your spouse and any other person listed on your return:
    - Social Security Number (SSN) Card
    - Adoption Taxpayer Identification Number (ATIN) card or letter*
    - Individual Taxpayer Identification Number (ITIN) card or letter*

    *(IRS assignment letters are acceptable)
3. Previous year's tax return
4. All W-2s for current year
5. Joint returns require both filers to be present to sign the return
6. Voided check or account number card to direct deposit your refund (This is optional, but allows for a quicker refund.)

IF APPLICABLE:

**1.** Form 1095-A if you purchased health insurance through the marketplace

2. Form 1098-Mortgage Interest, property taxes, closing statement

3. Form 1099-Div, G, INT, Q, R, RRB, SSA, MISC, NEC for current tax year

4. If you had childcare or dependent care expenses, please bring the name, address and Tax ID or SSN/ITIN of the care provider

**5.** Form 1098-T or 1098-E for educational expense

*********Have any additional items or documents you believe will be important for your tax preparer to have when completing your tax return.*********