

# Document Checklist

Before filing, gather items you may need:

## PERSONAL INFORMATION

- Photo ID \*
- Social Security card or ITIN assignment letter \*
- Copy of 2021 return (if using new online pgm.)
- Bank account & routing numbers

## INCOME INFORMATION

- W-2 Forms
- Any 1099 Form
- Alimony received
- Misc. income (jury duty, gambling winnings, etc.)

## HEALTH INSURANCE DOCS

- 1095-A, 1095-B, or 1095-C (if relevant)

## DEDUCTIONS AND CREDITS

- Charitable donations
- Medical and dental expense records
- Property Taxes and Mortgage Interest

## BACK-UP INFORMATION

- Alimony paid
- Any 1098 Form
- Childcare Costs

\* Required

Not sure where to start? Contact Opportunity Council's tax hotline: 360-746-0100, or [taxes@oppco.org](mailto:taxes@oppco.org)

## Why use an IRS Certified Free Tax Preparation Site?

- It's **FREE!** The average tax return costs \$240 but can range between \$100 and \$600. At free tax prep sites, no one's offering you costly loan products with hidden fees.
- It's **ACCURATE!** IRS Certified free sites have a 94% accuracy rate, while paid preparers are rated as only 40% accurate. This could mean more money owed or not getting a full refund.

## Tax Credits

### Working Family Tax Credit

People living in Washington can get up to \$1,200 cash back through the new Working Families Tax Credit, starting on February 1st 2023. Learn more at [www.WATaxCredit.org](http://www.WATaxCredit.org).

### Child Tax Credit (CTC) & Earned Income Tax Credit (EITC)

These tax credits will return to 2019 levels, meaning many taxpayers will likely receive a significantly smaller refund this year.

- CTC:** those who got \$3,600/dependent in 2021 will get \$2,000 this year.
- EITC:** taxpayers with no children who received ~\$1,500 in 2021 will get \$500.

**WABC**  
WHATCOM ASSET BUILDING COALITION



## 2023 Whatcom Tax Guide

opportunity  
council 



## IRS Certified Free Tax Preparation Sites

VITA available for people who make \$60,000 or less. No income limit for Tax-Aide.

### AARP Tax-Aide

**First Congregational Church - Bellingham**  
2401 Cornwall Ave.  
2/1 - 4/18  
Mon-Wed, 3-6:30pm  
Sat, 12 - 4:30pm  
**Drop-in only**

**Bellingham Senior Activity Center**  
315 Halleck St.  
2/3 - 4/4

**Appointment only**  
Visit BSAC to schedule.

### Northwest Indian College VITA

2522 Kwina Rd.  
360-392-4345

Opens 2/1

Mondays

8am - 4:30pm

#### **Appointment only**

Call to schedule an appointment for one-on-one help.

### WWU VITA

900 N State St.  
360-650-3500

Wednesdays

4:30 - 7:30pm

*Times subject to change, see whatcomabc.org*

#### **Drop-in only**

One-on-one assistance available at WWU Community Commons in the Stateside Building.



## Do it Yourself: Free Online Tax Programs & Help

Prepare and file your tax return for free, and find important information online

### IRS Free File

[irs.gov/freefile](https://irs.gov/freefile)

Free access to brand-name tax software.

### Get Your Refund

[getyourrefund.org](https://getyourrefund.org)

File your own taxes with IRS Certified assistance.

### Whatcom ABC

[whatcomabc.org/taxes](https://whatcomabc.org/taxes)

Find the latest information and tax updates.

**Tip:** many online programs provide free filing for simple tax returns, **but may charge a fee for more complicated returns.** To avoid an unexpected charge, utilize one of the IRS Certified resources listed above.

## VITA Intake Sites

VITA intake sites can get the tax return process started by collecting tax documents and information to be sent to an IRS certified tax preparer for completion. These free tax access points benefit rural communities, people with transportation barriers, or those more comfortable using a trusted provider.

### E. Whatcom Regional Resource Center

**8251 Kendall Rd., Maple Falls**

Wednesdays, 9am - 4pm

Thursdays, 12 - 7pm

Appointment recommended, but not required. Call 360-599-3944 to schedule.

### Community Resource Center

**1111 Cornwall Ave., Bellingham**

Wednesday, Thursday, Friday afternoons by appointment.

Call the Tax Hotline to schedule:

(360) 746-0100

### Hearing, Speech, and Deaf Center

**114 W Magnolia St., Bellingham**

Contact for more information:

Email: [bellingham@hsrc.org](mailto:bellingham@hsrc.org)

Phone: 360-647-0910

Video phone: 360-255-7166