

NSUBA partners with Goodwill Industries of Tulsa, VITA to offer free tax preparation services

BROKEN ARROW, Okla.— Northeastern State University Broken Arrow has partnered with Goodwill Industries of Tulsa and the Volunteer Income Tax Assistance (VITA) program to offer free tax preparation services to NSU and surrounding communities.

“This year, we are excited to announce that we are collaborating with Goodwill of Tulsa to expand our location’s ability to serve the community,” NSU Assistant Professor of Accounting Amber Whisenhunt said. “The VITA program is one of NSU’s most valuable community services. For many community members, 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. Clients should expect the same quality service and routine as has been available in the past.”

The tax preparation services begin Feb. 1 and will conclude on April 15, with the exception of Spring Break, March 12 - 19. For those individuals who qualify as having low-to-moderate income (\$60,000 and below), certified and trained volunteers will be available by appointment to prepare basic tax returns on both the state and federal levels.

The VITA Lab at NSUBA is open on Tuesdays from 10 a.m. – 4 p.m., Wednesdays and Thursdays from 5 – 9:30 p.m. and Saturdays from 10 a.m. – 3 p.m. on the first floor of the NSUBA Administration building. Appointments can be made by calling 918-449-6560. All participants should attempt to make an appointment, but walk-ins will be allowed if time permits.

“VITA volunteers are IRS certified annually, and unlike paid preparers, who are not required to have a license, VITA volunteers are trained extensively,” Goodwill VITA Program Manager Victoria Annesley said. “In addition, all tax returns are quality reviewed by one other preparer before they are submitted, which helps maintain accuracy rates higher than 95 percent.”

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

- Photo identification (Bring a copy also)
- 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 (Bring a copy also)
- 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 daycare providers, including tax identification number of the daycare 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.
- Information pertaining to the amount of Economic Impact Payments received.
- To file taxes electronically for “married filing joint” tax returns, both spouses must be present to sign the required forms.

Alternatively, individuals with an income of \$60,000 and less who would like to file their own returns electronically can do so at: www.MyFreeTaxes.com.

For more information, contact Whisenhunt at 918-449-6517 or at whisen05@nsuok.edu, or Annesley at 918-581-1277 or at victoria.annesley@goodwilltulsa.org.

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