



Income Eligibility & Exceptions

The Tax Help program seeks to align our income eligibility limits with the EITC income eligibility limits set by the IRS. Our income limit is \$50,000 (adjusted gross income) for individuals, \$75,000 for a tax household of 2-4 people, and we add \$5,000 for each additional member beyond 4 people.

We will waive the income limit for the following taxpayers:

- Current and retired military personnel or surviving spouse (with a military ID or DFAS documentation)
- Residents of Foundation Communities properties
- Staff of tax site hosts* (with proof of employment), which includes
 - Asian American Resource Center employees
 - Southeast Health and Wellness Center employees
 - LifeWorks employees
 - Round Rock Public Library employees
- Tax Help volunteer tax preparers (during slower periods when there is no client wait time)
- Foundation Communities staff (with proof of employment)
- Nonresident aliens filing a 1040-NR (Partial waiver: nonresidents often must file the 1040-NR without including spouses or dependents; the income limit will be applied to these individuals according to their actual household size. Example: a nonresident alien who is married may because of tax law need to file the 1040-NR without the spouse but must meet the income requirements for a family of 2-4.)

**Staff of tax site hosts may visit any Tax Help location. We are waiving the income limit for these partners regardless of whether we have a physical tax site at that location this year.*

Please note that we will not be able to prepare returns that are designated to be out of scope. (Please refer to the Publication 4012 Scope of Services chart for a full list of in- and out-of-scope items.) We also may request that our FC staff, FC volunteers, and the staff of tax site hosts utilize our services at times when it is less busy.

For those who are out of scope for our services or over our income limit:

Alternative option 1: Prepare your taxes online using MyFreeTaxes:

There is another option for those whose returns are out of scope, over the income limit, or for those who do not want to wait in line: you can prepare your return using MyFreeTaxes, an online software that benefits the Tax Help program. The software is free for the tax returns with less than \$66,000 in income. For higher incomes, fees apply.

Every tax return completed for zip codes within our service area is counted by the IRS as part of the Tax Help program's impact. Please share the link with your friends and family! Visit www.myfreetaxes.com.

2020 Updates: MyFreeTaxes does not have an income limit this year. BUT Schedule C, D, and E are not free.

Support is available 10am-10pm (ET) 7 days per week at 866-698-9435 or via chat on the website.

Alternative option 2: Get your taxes prepared for free with AARP:

Another option for those who are over the VITA income limit and would like assistance preparing their return is a local AARP Tax-Aide. Tax preparation services are free. To learn more, visit www.aarp.org or call 2-1-1.