

Free Income Tax Preparation

for low-income families and individuals

**New Covid-19 Policy: Drop-off & Pick-up
by appointment only**



You may qualify for the Earned Income Tax Credit!

To qualify, your annual income must be *less* than:

- \$50,954 (\$56,844 if married filing jointly) with three or more qualifying children
- \$47,440 (\$53,330 if married filing jointly) with two qualifying children
- \$41,756 (\$47,646 if married filing jointly) with one qualifying child
- \$15,820 (\$21,710 if married filing jointly) with no qualifying children
- Taxpayers with no qualifying children must be between the ages of 25 and 65
- Married couples must file jointly, children must have a valid social security number
- Must be a U.S citizen or resident alien

Appointments available at Beverly Bootstraps, 35 Park St., Beverly

Call **978-927-1561** starting **January 19** to schedule an Intake appointment:

When to call us: Mondays and Thursdays from 2:00 pm to 6:00 pm

Tuesdays from 9:00 am to 12:00 pm

Fridays from 2:00 pm to 4:00 pm

New for 2021: During your Intake appointment we will scan your tax documents;

We'll call you in 2 days to discuss your tax return, then you pick up the finished copy.

MONDAY by appointment	TUESDAY by appointment	THURSDAY by appointment	SATURDAY by appointment
February 8 - April 12 3:00 p.m. to 7:00 p.m.	February 2 - April 6 10:00 a.m. to 2:00 p.m.	February 4 - April 8 3:00 p.m. to 7:00 p.m.	March 20 - April 10 9:00 a.m. to 12:00 p.m.

**Use the back of this page to note the date and time of your appointment
and for a checklist of what to bring.**



Tax services are provided by Beverly Bootstraps. Please note we cannot prepare tax returns for residents of Puerto Rico.

My Tax Appointment:

Date: _____

Time: _____

At: Beverly Bootstraps, 35 Park Street, Beverly

Items to Bring:

When you come to your Intake appointment, be sure to bring:

1. **Photo ID** such as Driver's License or Passport;
2. **Social Security cards** for you, your spouse, and all dependents;
3. **A copy of last year's tax return;**
4. **Income information:**
 - Wages and earnings (Form W-2, 1099-Misc, 1099-NEC, 1099-K) from all employers;
 - Social Security (SSA-1099), pensions or IRA (1099-R);
 - Interest from banks (1099-INT) and dividends (1099-DIV);
 - Unemployment Compensation (1099-G);
 - Gambling or Lottery winnings (W-2G);
5. **Health insurance information:**
 - Health Insurance Cards and coverage information (1095-A, 1095-B, or 1095-C, 1099-HC);
6. **Information about Expenses:**
 - Childcare expenses: statement from daycare provider with amount paid and the provider's tax ID number;
 - Education expenses: Tuition: 1098-T, Student loan interest: 1098-E;
7. **Homeowners 65 and over:** property tax and excise tax bills, water/sewer bills;
8. **Bank account information:** routing and account numbers for direct deposit, such as a blank check, which will be returned to you;
9. **Both spouses must be present** to file a **married-filing-jointly** tax return, and **both must sign** the required forms.