



Transitional Assistance

Visit us at: wp.sbcounty.gov/tad/resources

FREE TAX Preparation Service

SERVICES BEGIN JAN. 27, 2025.

Call 1 (877) 410-8829 to make an appointment for a Tax Preparation Site.

Available to **Eligible** individuals and families whose combined household earned income was **LESS than \$67,000** in 2024.

If you worked in 2024, you may be eligible to receive the:

- ▶ **California Earned Income Tax Credit** for a refund up to \$3,644.
- ▶ **Federal Earned Income Tax Credit** for a refund up to \$7,830.

Eligibility depends on your income and family size.

Location	City	Address
East Valley	Colton	1900 W. Valley Blvd.
	Redlands	1811 W. Lugonia Ave.
	San Bernardino	2740 Little Mountain Dr.
West Valley	Fontana	7977 Sierra Ave.
	Ontario	1647 E. Holt Blvd.
	Rancho Cucamonga	10825 Arrow Rte.
Desert Areas	Rialto	1175 W. Foothill Blvd.
	Barstow	1900 E. Main St.
	Hesperia	9655 9th Ave.
	Victorville	15010 Palmdale Rd.
	Yucca Valley	56357 Pima Trl.
	Twentynine Palms	73629 Sun Valley Dr.



ADDITIONAL LOCATIONS

- Anthony Munoz Community Center, Ontario
- Arrowhead Regional Medical Center
- Baker Family Learning Center
- Big Bear Senior Center
- City of Montclair Senior Center
- IEHP Community Resource Center, San Bernardino
- IEHP Community Resource Center, Victorville
- Needles, Transitional Assistance Department
- Ontario City Library, Ovitt Family Community Library
- San Bernardino Valley College
- Solera at Apple Valley, Apple Valley
- Teamsters, Local 1932
- United Food and Commercial Workers, Bloomington

AMERICA'S JOB CENTER OF CALIFORNIA	COUNTY LIBRARIES	HOPE THROUGH HOUSING	PRESCHOOL SERVICES DEPARTMENT
Rancho Cucamonga San Bernardino Victorville	Chino, Chino Hills, Crestline, Fontana, Grand Terrace, Hesperia, Highland, Mentone, Montclair, Phelan, Rialto, Wrightwood, Yucaipa	Sunset Heights, Alta Loma, The Plaza at Sierra, Fontana, Vista Del Cielo, Montclair, Rancho Verde, Rancho Cucamonga, Metro View, Rialto, Impressions, Victorville	Apple Valley Ontario (Maple) San Bernardino

WHAT MUST I BRING TO MY TAX APPOINTMENT?

1 Identification

For all persons listed on the tax return:

- ✓ Government-issued ID or driver's license (no copies)
- ✓ Date of birth(s)
- ✓ Original Social Security card(s) or Individual Tax Identification Number (ITIN) card(s) or letter(s) (no copies)



2 Income

- ✓ W-2s for each job worked in 2024
- ✓ All 1099 forms
- ✓ Any other tax-related income forms received



3 Education Credits & Adjustments

- ✓ Tuition expenses for university, college or technical college (Form 1098-T)
- ✓ Interest statement for student loans (Form 1098-E)



4 Child Credits

- ✓ Child care expenses: Provider name, address, phone number, and Tax ID or Social Security Number



5 Itemized Deductions

- ✓ Charitable donations
- ✓ Medical expenses
- ✓ DMV registration statement(s)
- ✓ Mortgage interest statement(s) (Form 1098)
- ✓ Verification of real estate taxes paid, or a property tax statement



6 Additional Documents

- ✓ Copy of 2023 tax return
- ✓ Direct deposit information: bank routing and account number
- ✓ Health insurance documents (Form 1095 A, B or C)



OTHER IMPORTANT REQUIREMENTS

- ✓ Both spouses must be present to prepare and file as married filing jointly
- ✓ Taxpayers itemizing deductions must add up all expenses prior to having returns prepared

We do NOT provide the following services:

- Married filing separately
- Out of state returns
- Rental property tax preparation
- Military returns

BRING ALL APPLICABLE TAX DOCUMENTS AND ORIGINAL GOVERNMENT-ISSUED IDENTIFICATION WITH YOU TO YOUR APPOINTMENT!

IRS regulations require all tax-related documents and original government-issued identification to be present at your tax preparation appointment. If any documents or verifications are missing at the time of your appointment, we will not be able to process your tax return.

Questions? Call 1 (877) 410-8829