



Income Eligibility & Exceptions

The income eligibility limits are currently:

- Household size of 1: \$60,000
- Household size of 2 to 4: \$85,000
- Household size of 5+: \$85,000 + \$5,000 for each additional member

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
 - Southeast Health and Wellness Center employees
 - Wells Branch Recreation Center employees
 - Round Rock Public Library employees
 - ACC Highland employees
 - Operation Liberty Hill employees
 - St. John Vianney Catholic Church employees
 - Hutto Public Library employees
 - Taylor 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 Form 1040-NR

Note: This is a partial waiver. Nonresidents often must file the 1040-NR without including a spouse or dependents; the income limit is applied to these individuals using their actual household size. For example: a nonresident alien who is married but will file Form 1040-NR without their spouse must meet the income requirements for a family of 2 to 4 people.

Regardless of income eligibility exemption, the Tax Help Program will not prepare returns that are out of scope for VITA. We also may request that FC staff, FC volunteers, and the staff of tax site hosts utilize our services during less busy times of the day or tax season.

For those whose returns are out of scope for our services, provide the client with the “We Cannot Prepare Your Return” handout.