

APPLICATION

SAN FRANCISCO WORKING FAMILIES CREDIT

For 1st time Applicants Only

Find out your new health coverage options under the Affordable Care Act! Open enrollment period ends January 31, 2019, so don't delay! Apply online at www.mybenefitscalwin.org or call SF BenefitsNet at 855-355-5757 or visit 1440 Harrison Street or 1235 Mission Street M-F, 8am-5pm.

Ask your tax prep professional about the California Earned Income Tax Credit



Working Families Credit City & County of San Francisco

Complete and return this form or take it to your tax preparer when you file your taxes.
To download more applications, visit: www.workingfamiliescredit.org

TAX YEAR 2018

Due April 15, 2019

PACKET INCLUDES: Program Information & Locations • Application/4506T-EZ Form

Short Form Request for Individual Tax Return Transcript

▶ **Request may not be processed if the form is incomplete or illegible.**
▶ **For more information about Form 4506T-EZ, visit www.irs.gov/form4506tez.**

Tip. Use Form 4506T-EZ to order a 1040 series tax return transcript free of charge, or you can quickly request transcripts by using our automated self-help service tools. Please visit us at IRS.gov and click on "Get Transcript of Your Tax Records" under "Tools" or call 1-800-908-9946.

1a Name shown on tax return. If a joint return, enter the name shown first.	1b First social security number or individual taxpayer identification number on tax return
2a If a joint return, enter spouse's name shown on tax return.	2b Second social security number or individual taxpayer identification number if joint tax return

3 Current name, address (including apt., room, or suite no.), city, state, and ZIP code (see instructions)

4 Previous address shown on the last return filed if different from line 3 (see instructions)

5a If the transcript is to be mailed to a third party (such as a mortgage company), enter the third party's name, address, and telephone number. The IRS has no control over what the third party does with the tax information.

Third party name	Telephone number
City & County of San Francisco - HSA, Working Families Credit Program	415-557-6284
Address (including apt., room, or suite no.), city, state, and ZIP code	

5b Customer file number (if applicable) (see instructions)

P.O. Box 7988, San Francisco, CA. 94120

Caution. If the tax transcript is being mailed to a third party, ensure that you have filled in line 6 before signing. Sign and date the form once you have filled in this line. Completing this step helps to protect your privacy. Once the IRS discloses your IRS transcript to the third party listed on line 5, the IRS has no control over what the third party does with the information. If you would like to limit the third party's authority to disclose your transcript information, you can specify this limitation in your written agreement with the third party.

6. Year(s) requested. Enter the year(s) of the return transcript you are requesting (for example, "2008"). Most requests will be processed within 10 business days.

2018

Note. If the IRS is unable to locate a return that matches the taxpayer identity information provided above, or if IRS records indicate that the return has not been filed, the IRS will notify you or the third party that it was unable to locate a return, or that a return was not filed, whichever is applicable.

Caution. Do not sign this form unless all applicable lines have been completed.

Signature of taxpayer(s). I declare that I am the taxpayer whose name is shown on either line 1a or 2a. If the request applies to a joint return, **either** spouse must sign. **Note:** This form must be received by IRS within 120 days of the signature date.

Signatory attests that he/she has read the attestation clause and upon so reading declares that he/she has the authority to sign the Form 4506-T. See instructions.

Sign Here	<table border="1" style="width:100%; border-collapse: collapse;"> <tr> <td style="width:60%; padding: 5px;">Signature (see instructions)</td> <td style="width:40%; padding: 5px;">Date</td> </tr> </table>	Signature (see instructions)	Date	Phone number of taxpayer on line 1a or 2a
	Signature (see instructions)	Date		
<table border="1" style="width:100%; border-collapse: collapse;"> <tr> <td style="width:60%; padding: 5px;">Spouse's signature</td> <td style="width:40%; padding: 5px;">Date</td> </tr> </table>	Spouse's signature	Date		
Spouse's signature	Date			



APPLICATION FOR SAN FRANCISCO WORKING FAMILIES CREDIT

THIS APPLICATION MUST BE SUBMITTED OR POSTMARKED BY APRIL 15, 2019 TO BE CONSIDERED.

AM I ELIGIBLE? *FINAL ELIGIBILITY WILL BE DETERMINED BY THE CITY AND COUNTY OF SAN FRANCISCO.

Complete this checklist to determine your eligibility for the credit.

- 1. I have NEVER received the San Francisco Working Families Credit before.
2. (If married), my spouse has NEVER received the credit either.
3. I am claiming the federal Earned Income Tax Credit.
4. I claimed at least one qualifying dependent child on my federal tax filing who is either: A) under age 19; B) under age 24 and a full-time student; or C) permanently and totally disabled.
5. I am a current San Francisco resident and I was a San Francisco resident at the time of my federal tax filing.

If you answered FALSE to any statement above, STOP. You cannot apply for the credit.

LAST NAME: (PLEASE print in CAPITAL letters)

Grid for last name input

FIRST NAME: (PLEASE print in CAPITAL letters)

Grid for first name input

MI

MI input box

SOCIAL SECURITY NUMBER:

Grid for social security number input

SPOUSE'S LAST NAME: (If filing taxes jointly)

Grid for spouse's last name input

SPOUSE'S FIRST NAME:

Grid for spouse's first name input

SPOUSE'S SOCIAL SECURITY NUMBER:

Grid for spouse's social security number input

PHONE NUMBER:

Grid for phone number input

ADDRESS:

Grid for address input

CITY:

Grid for city input

STATE:

Grid for state input

ZIP:

Grid for zip input

DATE OF BIRTH (MM / DD / YYYY):

Grid for date of birth input

Stay connected to the WFC Program year-round! E-MAIL ADDRESS:

You may receive your credit in the form of a check or by direct deposit. To receive the maximum credit amount of \$500 you must use direct deposit. If you ask for a paper check, you will only receive \$200.

- I would like to receive a \$200 check.
I would like to receive \$500 direct deposited to my bank account.*
You must mark the type of account being used:
Checking account (YOU MUST ATTACH A VOIDED CHECK FROM THE ACCOUNT LISTED BELOW.)
Savings account

Bank Routing Number:

Grid for bank routing number input

Account Number:

Grid for account number input

*IF THERE IS A CHANGE TO YOUR BANK ACCOUNT INFORMATION, YOU MUST CONTACT THE WFC PROGRAM TO ENSURE YOU RECEIVE THE FULL CREDIT.

- Check here if you do not wish to receive information about other programs that help working families (e.g. Medi-Cal, Food Stamps).
Check here if you do not wish to be contacted to help evaluate the success of this program.

Certification

- To the best of my knowledge the information provided on this application is true and correct. I understand that the City and County of San Francisco may verify the information using my tax transcript from the Internal Revenue Service.
I know that Working Families Credit benefits may be denied if any information on this application is found to be untrue or is left off the application.
I understand that receipt of the credit is subject to availability of funds.

Applicant's Signature

Date

Grid for date input



APPLICATION FOR SAN FRANCISCO WORKING FAMILIES CREDIT

WHAT IS THE WORKING FAMILIES CREDIT?

The Working Families Credit is a commitment by the City of San Francisco to help low-income families keep more of what they earn. Eligible families that use direct deposit will receive a Credit up to \$500 from the City in addition to their federal Earned Income Tax Credit (EITC) payment, subject to available funds. Eligible families that ask for a paper check will only receive a Credit for \$200 in addition to their federal EITC payment. This credit will not count as income for determining eligibility for most public benefit programs.

Please note: The Credit is only available to eligible applicants who have NEVER received the credit before.

**For help completing the application and/or help filing your taxes
call 211 for a FREE Tax Preparation site near you!**

INSTRUCTIONS

Step 1: Check if you are eligible.

You are eligible if you meet **all six** of the criteria below:

1. You (and your spouse, if married) have **NEVER received the San Francisco Working Families Credit before.**
2. You earned less than **\$54,884 in 2018.**
3. You claim and qualify for the federal Earned Income Tax Credit.
4. You are claiming at least one qualifying dependent child on your federal tax filing who is either: A) under age 19; B) under age 24 and a full-time student; or C) permanently and totally disabled.
5. You live in San Francisco.
6. You have filed taxes by the April 15th deadline.

Step 2: Complete the application

Complete the application forms on page 1 and 2. **You must complete and sign both pages.** You can complete the application yourself or have a tax preparer complete it for you. For help completing the application call 211 to find a FREE tax preparation site near you!

Step 3: For direct deposit to a checking or savings account, you must mark the correct boxes on page 2 and provide the complete routing number and account number in the spaces provided. For direct deposit to a **checking account**, you must **attach a voided check** to your application. For savings accounts, contact your bank or credit union for the routing number for receiving an electronic deposit from a 3rd party.

Step 4: Submit by April 15th, 2019

Send your completed application to:

**City and County of San Francisco - HSA
WFC Program
PO Box 7988
San Francisco, CA 94120**

Or deliver to HSA, 170 Otis Street, reception desk (first floor), or any free tax preparation site in San Francisco.

Applications must be postmarked or delivered by April 15th, 2019. Do not attach your tax documents to the application.

Step 5: Receive your Working Families Credit in September

If your application is successful, you will receive your Working Families Credit in September 2019, subject to availability of funds.

For More Information about Ways to Save Money on Your Everyday Expenses, visit us online:
www.workingfamiliescredit.org