



San Francisco Human Services Agency

SAN FRANCISCO WORKING FAMILIES CREDIT

Application
Tax Year 2019



The Working Families Credit (WFC) helps San Francisco families keep more of what they earn.

Receive an additional credit of up to \$250 if you claim the Federal EITC.

NEW! The WFC is no longer a one-time benefit. Families that received the credit before can apply again.

Due April 15, 2020

Complete and return this form or take it to your preparer when you file your taxes.

- Free tax preparation services are available to low- to moderate-income households in San Francisco.
- To find free tax service locations and download WFC applications, visit:

FreeTaxHelpSF.org



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 families that qualify for the federal Earned Income Tax Credit (EITC) keep more of what they earn. Eligible families that use direct deposit will receive a Credit up to \$250 from the City in addition to their federal Earned Income Tax Credit payment, subject to available funds. Eligible families that ask for a paper check will only receive a Credit for \$100 in addition to their federal EITC payment. This credit will not count as income for determining eligibility for most public benefit programs. Please note: NEW this year, families that received the credit before can receive it again.

INSTRUCTIONS

Step 1: Check if you are eligible

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

1. You earned less than **\$55,952 in 2019**.
2. You claim and qualify for the federal Earned Income Tax Credit.
3. If married, your spouse is not applying for the Working Families Credit this year.
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 3 and 4. **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 4 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**, a copy of your **bank statement**, or a **direct deposit form** from your financial institution (bank, credit union, or prepaid card company) to your application. If you want a direct deposit to a savings account, contact your bank or credit union for the routing number for receiving an electronic deposit from a third party.

Step 4: Submit by April 15, 2020 and include a copy of your federal tax return.

Send your completed application and a copy of your federal tax return 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 15, 2020.

Step 5: Receive your Working Families Credit in September

If your application is successful, you will receive your Working Families Credit in September 2020, subject to availability of funds.

For more information about the WFC Program, call 415-557-6284 or send an email to wfc@sfgov.org

File your taxes for FREE

Need help completing the WFC application or filing your taxes? Free tax preparation services are available to low- to moderate income individuals, families, and seniors. Tax returns are prepared by IRS-trained experts at 30+ local community organizations in San Francisco.

Make an appointment at a free tax site near you. Find free tax locations by calling 2-1-1 or go to FreeTaxHelpSF.org

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)

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

Note: Effective July 2019, the IRS will mail tax transcript requests only to your address of record. See **What's New** under **Future Developments** on Page 2 for additional information.

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.

2019

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 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 4506T-EZ. See instructions.

Sign Here	Signature (see instructions)	Date	Phone number of taxpayer on line 1a or 2a
	Spouse's signature	Date	



APPLICATION FOR SAN FRANCISCO WORKING FAMILIES CREDIT

THIS APPLICATION MUST BE SUBMITTED OR POSTMARKED BY APRIL 15, 2020 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 am claiming the federal Earned Income Tax Credit.
2. (If married), my spouse is not applying for the Working Families Credit this year.
3. I have included a copy of my federal tax return with this application.
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

For program staff to contact you, if needed. 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 \$250, you must use direct deposit. If you ask for a paper check, you will only receive \$100.

- I would like to receive \$250 direct deposited to my bank account.*
I would like to receive a \$100 check.

You must mark the type of account being used:

- Checking account (You must attach a VOIDED CHECK, a copy of your BANK STATEMENT, or an OFFICIAL DIRECT DEPOSIT FORM.)
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.

How did you hear about the Working Families Credit? Please mark all that apply:

- Online website, Bus Ad, Social Media, Mailer / Postcard, Friend / Family, Poster / flyer, Free Tax Preparer, Paid Tax Preparer

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