

## ***General***

- Your 2019 Federal and State tax return(s) or your 2018 tax returns if you did not have your taxes prepared for 2019. Bring your 2019 or 2018 tax returns no matter who prepared them.
- Social Security cards for yourself and every individual on your return (required this year).
- Photo I.D. required for taxpayer and, if on return, spouse.
- Checkbook, blank check, or bank statement (not a deposit slip) with account and routing number if you want to direct deposit any refund(s) into your bank account or My Retirement Account or for direct debit if needed).
- If *Married and Filing Separately*, bring spouse's SS# and name as spelled on SS card.

## ***Income***

- W-2 from each employer
- Unemployment compensation statements
- 1099 Forms (these cover social security statements, railroad retirement statements, interest, dividends, pensions, IRA disbursements, stock sales) and the basis for any sales--purchase date and cost
- Information about other forms of income, such as alimony received or paid
- State and local income tax refunds
- Did you receive Stimulus Payments? Bring any paperwork or check your bank statements so you can tell us what was received and when, or if you have not yet received one of those payments. Stimulus payments are NOT taxed, but we do need this information for your tax return.

## ***Payments***

All forms, receipts, and canceled checks indicating federal and state income tax paid (including quarterly estimated tax payments)

## ***Deductions***

Some taxpayers have a choice of taking either a standard deduction or itemizing their deductions. Tax Counselors will work with the tax-payer to determine which choice results in the lowest overall tax burden. If taxpayers have a substantial amount of deductions, they may want to itemize. They will need to bring the following information, *especially if they itemized their deductions last year or had changes in their situation that would mean they would benefit from itemizing this year; for example, large medical or dental bills, a new mortgage, etc.*

- 1098 Form showing any home mortgage interest
- A list of medical/dental expenses (including doctor and hospital bills and medical insurance premiums), a total of receipts for prescription medicines, costs of assisted living services, and bills for home improvements such as ramps and railings for people with disabilities
- A list of Charitable Contributions (monetary) and non-monetary
- For people taking the Standard Deduction, a new deduction is available for up to \$300 - monetary donation only.
- Property Tax bills and proof of payment

## ***Health Insurance***

If you have health insurance through the Marketplace (Exchange), you **MUST bring your 1095A form**. Without that form, we cannot do the your return. The 1095A form is the only required health insurance form.

## ***Credits***

- Dependent Care or Child Care provider information (name, employer ID or Social Security number, phone number, and address).
- 1098-T and 1098-E Forms (Tuition and Student Loan Interest). If tax payers have a 1098-T, they should also have the student print out a

Student Account Statement (the student can download a copy from the bursar's office online site) for the tax year showing all charges paid to the school.

**If you do not speak English, please bring someone to translate.**

**If it will be a joint return, both husband and wife must be at the appointment.**