

## What to Bring to Have Your Tax Return Prepared

12/29/2022

### Note that we CANNOT prepare your return if you:

1. Owe any special taxes (such as alternative minimum tax or household employment taxes)
2. Have business income with net loss OR with expenses over \$35,000 OR have inventory OR home office
3. Received a 1099-S for the sale of any real estate other than a personal residence
4. Have farming income
5. Have rental income with any expenses or depreciation
6. Have income as a minister (active or retired)
7. Have loss with bankruptcy or want to get an adoption credit.

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- \* \_\_1. Bring **Photo Identification** for you and your spouse and **Tax Identification** for you, your spouse, and all dependents.

**Tax Identification must be one of the following:**

- (1) Social Security card, or
- (2) Social Security statement of benefits (SSA-1099), or
- (3) Verification letter from the Social Security Admin., or
- (4) ITIN Letter

**(We cannot accept military IDs or other substitute documents as your Tax identification)**

- \* \_\_2. **A printed copy of your 2021 Federal and NC tax returns and (if available) accompanying tax documents**  
If your taxes were done here last year, please bring the tax envelope we gave you and everything in it.
- \* \_\_3. A **blank check** (or a legible photo copy of a check) if you would like direct deposit or debit. It will be returned to you.  
Deposit slips are NOT acceptable. A card from the bank with routing & account numbers is acceptable
- \_\_4. **All "Tax Document" forms** received for the **2022** tax year:
- a. Statement of Social Security benefit (SSA-1099)
  - b. State tax refund statement (usually on a post card)
  - c. W-2 forms from each employer and W-2G (gambling winnings)
  - d. 1099 forms: 1099-INT, 1099-DIV, 1099-R (pensions, IRAs, 401Ks), 1099-NEC, 1099-MISC, 1099-G (unemployment compensation), 1099-S (sale of home), RRB-1099 (railroad retirement), etc.
  - e. Form 1095-A, if you had Marketplace health insurance
  - f. Form 1098-T and documentation on scholarships & **all** education expenses (including who paid which expenses)
  - g. Any other papers labeled "Tax Documents" that you received in the mail
- \_\_5. Interest and/or dividend records not on a 1099 form
- \_\_6. All forms/ records indicating federal & state income **taxes paid** not already listed, such as **estimated tax payments**
- \_\_7. Records on any **business or self-employed** income and all associated expenses (including non-commuting mileage)
- \_\_8. If you **sold any stocks, bonds, or mutual funds**, we need to know **how acquired** (purchased, received as gift, inherited), **cost, date acquired**, and the 1099-B brokerage statement (which shows the sale price & date of sale)
- \_\_9. **Childcare** provider information (name, employer ID/ SSN, address) and record of amounts paid for each child
- \_\_10. If you expect to itemize deductions (must be more than your NC standard deduction: Single: \$12,750, Married Couple: \$25,500), then bring an **organized** list of deductions (as mortgage interest and insurance, property & vehicle taxes, medical expenses, charitable contributions, non-cash donations etc.). This form is available at the Senior Center to help you organize your material: **ItemizedDeductionsIntake&ClientTakeHomeList**
- \_\_11. Any other documents that might affect your tax return, such as **student loan interest**, **alimony**, repayment of first-time homebuyer credits from 2008 (or 2009 if the home ceased to be the main home within 36 months), **gambling winnings/losses**, **Health Savings Account contributions/distributions**, etc.