



What to bring to your intake appointment

In order to successfully prepare your taxes, we will need access to several types of personal identification and tax documents. Please review this list and gather all of your relevant documents prior to your appointment. Also bring a mask and your own working pen to sign documents.

We realize that all of this information may not apply to you, but please read though it all. Don't be intimidated, we just want to make sure you and we have all the information needed to successfully complete your tax returns.

Proof of Identification, Birth Dates, and Social Security Cards

For a joint return, both taxpayers must be present at the appointment.

We will need birthdates for everyone on the return and to see and copy

- a valid form of photo identification, such as a driver's license, for the taxpayer(s) and
- social security cards for all persons listed on the tax return, including dependents.

If you have an ITIN you must also bring that number.

Tax Documents

Bring any tax documents you received related to your 2020 taxes. These may include:

Income

- Did you work in 2020?
 - W-2s for ALL jobs held
 - Other income statements (1099-NEC, 1099-MISC) and/or records of cash or other income
 - If you are self-employed, we can help you only if you did not have a loss, had no employees, no contract workers, and no inventory, and your business expenses were less than \$35,000. If not, we regret that we cannot prepare your return. You may want to consider using one of the free filing options listed on our website.
- Did you receive Unemployment Insurance payments in 2020? If so, you need to go to your Department of Labor online account and get a copy of your 1099G statement showing your total Unemployment Insurance paid and the amount of any withholding tax.
- Did you receive retirement income?
 - Social security statements (1099 SSA)
 - Pension, IRA, Annuity, and other Retirement Statements (1099R)
- Did you have any bank, investment, brokerage, or mortgage accounts?
 - interest and dividend statements (1099 INT and 1099 DIV forms)
 - income or loss from sale or exchange of stocks, bonds, real estate? (1099-B, 1099-S)
- Did you have any other income, for example gambling, lottery, alimony, jury duty, or royalties?
- Did you have a credit card or home mortgage debt cancelled? (1099-C)
- Did you receive interest on your 2019 tax refund? Bring your refund statement.
- If you have rental income (or loss), we can help only if your only rental was your home or a part of it for 14 or fewer days 2020. Otherwise, we regret that we cannot prepare your return. You may want to consider using one of the free filing options listed on our website.

Possible deductions or credits

- Did you pay interest on a student loan? (1098E)
- Did you pay tuition or other expenses for yourself or someone else in higher education?
 - 1098-T and itemized bills from the school
- Did you make cash contributions to a qualified charity? Even if you take the standard deduction, you may deduct up to \$300 in cash contributions.
- Do you expect to receive an Earned Income Tax Credit or Child Tax Credit? Make sure we have copies of your 2019 return as well as 2020 information.
- Did you pay for day care for a dependent?
 - total amount paid for daycare for each dependent and reason why daycare was needed and
 - tax ID or social security number of daycare provider
- Do you have a Health Savings Account? (1099-SA, 5498-SA)
- Did you make contributions to an IRA or other retirement account? (Form 5498 or your W-2 or any other document that shows the contributions)
- If you think you may want to itemize deductions on either your federal or NYS return, bring information about medical expenses, taxes, mortgage expenses, charitable contributions, investment account expenses, NYS tax refunds. Note that NY allows many itemized deductions that the federal government does not.
- Did you receive the first or second Economic Impact (COVID) Payments? (Notice 1444 or other information on the amounts you received by direct deposit or check)
- Do you purchase health insurance from the NY Health Plan Marketplace (NY State of Health)? (Form 1095-A)

Did you receive a form that you think may be related to your taxes, but you aren't sure? Bring it along just in case.

Depending on your personal financial situation, your TCE volunteer may need access to other tax-related documents. We will let you know if additional information or documents are needed.

Previous Year's Tax Return

If you filed a tax return last year, be sure to bring a copy of your returns. This will be especially important if you are eligible for a Child Tax Credit or Earned Income Credit. If you had your return done at Lifelong last year, you have an envelope that contains the return and documents.

Bank Account & Routing Information

The fastest way to receive a tax refund is by choosing direct deposit to a checking or savings account. Be sure to bring either a copy of a check, or routing and account numbers for your account.

If you are filing a joint return, remember that both parties must return and sign your official return before it can be electronically filed.