

## **WHAT to BRING to YOUR TAX APPOINTMENT?**

### **PERSONAL DOCUMENTS: All of these documents are REQUIRED!**

- PHOTO ID for **BOTH** you and your spouse (if filing jointly); **CANNOT be expired!**
- SOCIAL SECURITY CARDS, Social Security Number verification letters, or ITIN assignment letters for you, your spouse, and any dependents. **MUST** have actual Social Security cards - **CANNOT** pull from past returns AND printout from the Social Security office is **NOT** acceptable!
- BIRTHDATES for you, your spouse, and dependents on the tax return
- VOIDED CHECK, DEPOSIT SLIP, or BANK/MEMBER ID Card with bank account & routing number. **NO** handwritten account numbers or previous years taxes may be used for bank account info!
- 2020 FEDERAL & STATE TAX RETURN

### **INCOME: Bring all documents that apply.**

- W-2 form(s) for ALL jobs last year
- Social Security Benefits (SSA-1099 form)
- Pension/IRA/Annuity Income (1099-R)
- Unemployment Benefits (1099-G)- **MUST PRINT** from Uplink account or call WorkOne at (812) 376-3351 to access their computers. NEW WorkOne office located at: 1531 13<sup>th</sup> Street in Doug Otto United Way Center
- Income or loss from the sale of stocks or bonds
- Statements for prizes or lottery/gambling winnings
- Interest and dividend statements from banks or credit unions
- Any other 1099's received

### **DEDUCTION RECEIPTS: ALL receipts MUST be totaled BEFORE tax appointment; preparers will NOT add amounts for you!**

- Property tax receipts if you are a homeowner
- Rental receipts (rent and/or lot rent) AND landlord's name & address
- Childcare expenses, including payment records or receipts AND providers name, address & federal tax ID number (either their Social Security Number or Employment Identification Number (EIN))
- College tuition (1098-T) and student loan statements (Form 1098-E)

### **DO YOU ITEMIZE?**

- **ALL receipts MUST be totaled BEFORE tax appointment; preparers will NOT add amounts for you!**
  - Home Mortgage Interest, Medical/Dental Expenses, Charitable Contributions, Mileage

### **OTHER ITEMS**

- IRS Letter 6475 for Stimulus Checks (direct deposit or paper check received approximately January-March 2021)
  - \$1,400/person (adult or child)
- IRS Letter 6419 for your Child Tax Credit advance payments (payments received July-December 2021)
  - \$300/month/child (0-5 years old); \$250/month/child (6-16 years old)
- Form 1095-A if you had health coverage through Health Insurance Marketplace (HealthCare.gov)
- ALL 2021 Federal & State estimated quarterly tax payment amounts & dates (if applicable)
- Death certificate if person passed away in 2021
- Both spouses **MUST** be present to sign required forms (if filing jointly) when picking up return!