

This program is for those who have taxable income of \$60,000 or less. We are not qualified to do business tax returns. This program is **not** designed to assist with most Schedule C, Schedule E or self-employed tax returns (e.g., if you received a 1099-NEC or 1099-MISC).

The following forms and other information should be brought to the tax preparation appointment:

- Completed IRS Form 13614-C (Intake/Interview Sheet) with signed Consent Form 15080
- A copy of last year's (2022) tax returns (**both Federal and State**), and any IRS Notices
- A Photo ID (proof of identification)
- Social security cards and dates of birth for you, spouse, all children or other dependents
- To file taxes electronically on a married-filing-joint tax return, both spouses must be present to sign the required forms
- **Form W-2** (showing salaries and wages earned in 2023)
- **Form 1095-A** (if you purchased health insurance through the marketplace)
- Any IRA, Pension, or Annuity distributions received (**Form 1099-R**)
- Any social security received (**Forms SSA-1099 or RRB-1099**)
- Any other income received in 2023
- Any **Form 1099-NEC or 1099-MISC** (showing miscellaneous income or independent contractor work)
- HSA information (**Form 1099-SA** that shows contributions and distributions during 2023)
- Interest or Dividends received (**Forms 1099-INT or 1099-DIV** or **year-end bank statements**)
- Receipts, records, or statements for any of the following that apply:
 - Mortgage or home equity interest paid (**Form 1098**)
 - Rent paid in 2023, including the name and address of landlord
 - Property taxes paid in 2023 (usually **Form 1098**)
 - Charitable contributions (cash and non-cash items)
 - If you purchased a new car during the year, a copy of the purchase documents showing the sales tax paid
 - Taxes paid (including excise taxes) for automobile license plates (bring a copy of registrations for all cars, trailers, ATVs, etc.)
 - Sales of stock (**Form 1099-B**) – you must have cost basis (what you paid for stock)
 - Medical & Dental expenses paid (including Medical/Dental insurance payments), along with record of insurance reimbursement
 - Contributions to IRAs (Roth or Traditional) for tax year 2023
 - Education expenses (usually **Form 1098-T**); also bring actual payment schedule and Form 1098-T for 2022 and 2023
 - Virtual Current Transactions
 - Interest on education loans (usually **Form 1098-E**)
 - Anything else that might be required to prove deductible expenses
 - If you have childcare expenses, a statement with the name, address and taxpayer ID number (social security number or EIN number) of the person you paid
 - If you made quarterly estimated tax payments, a list of the amount and dates paid
 - If you purchased or sold a home, a copy of your HUD closing/settlement statement

- If you operated a simple business, **you must have** calculated all related information, and have your information in an easy to read format, or we will not be able to assist you. See IRS Form Schedule C for the categories of expenses.
- If an automobile is used for business, bring all records showing associated expenses (cost basis for auto, date placed in service, total miles and business miles, gasoline, oil, insurance, repairs, license plates, etc.)