

Tax Appointment Check List

IMPORTANT DOCUMENTS TO TAKE WITH YOU TO GET YOUR TAX RETURNS AND TAX CREDIT FORMS PREPARED AND FILED: **Bring only what applies to you.**

IDENTIFICATION / SOCIAL SECURITY NUMBERS

- PHOTO ID: Driver's License or State ID for yourself and spouse
- Social Security card for yourself, spouse and each dependent on your return
- Identity Protection Personal Identification Number (IP PIN) - IRS Letter CP01A

Taxpayers filing a joint return must both be present to sign and file return unless there is a Power of Attorney for the absent spouse.

INCOME STATEMENTS OR FORMS

- A copy of last year's return
- Wages (all Forms W-2)
- Unemployment (Form 1099-G)
- Pension (Form 1099-R)
- Social Security (Form SSA-1099)
- Supplemental Security Income (SSI), Letter from SSA
- Interest/Dividends (Form 1099-INT or 1099-DIV)
- Gambling/Lottery Winnings (Form W-2G)
- Contract/Self Employment Income (Form 1099-NEC or 1099 - MISC)
- End of year Paystub
- Any other income documentation you may have such as 1099 K

PROOF OF EXPENSES

- Mortgage Interest (Form 1098)
- Medical or HMO Premiums paid for self and any family members
- Form 1095-A Health Insurance from Get Covered NJ or Marketplace
- Dependent care expenses and Tax ID Number
- Student loan interest (Form 1098-E)
- Tuition and course material (Form 1098-T) - online as part of students financial account and print out of each terms detailed bill
- detailed mileage log if self employed

HOMEOWNERS

- A complete copy of your prior year property tax
- Property Tax Reimbursement Book (PTR) - Blue Book - Senior Freeze

RENTERS

- Amount of your total rent paid

DIRECT DEPOSIT IS THE FASTEST AND SAFEST WAY TO RECEIVE YOUR REFUND.

- Voided Check
- Your bank or credit union name
- Bank Routing number
- Account number for checking and savings

Information adapted from www.irs.gov/Individuals/Checklist-for-Free-Tax-Return-Preparation

GIVE. ADVOCATE. VOLUNTEER.

United Way
of Northern New Jersey

UnitedWayNNJ.org/FreeTaxPrep

