

Tax Preparation Readiness Checklist

Note the time and location of your appointment. Dial 2-1-1 to make an appointment.

Date: _____

Time: _____

Location: _____

Forms and documents needed at your appointment.

It is important to bring all tax forms and records with you to the appointment. Missing forms and records causes delays in delivery of your tax refund.

Everyone must bring the following:

- Social Security cards for yourself and all your dependents
- Photo I.D. for you (and spouse)

Important items to bring

- Routing number and account number for your bank account. If you are unfamiliar with this, just bring your checkbook so your refund(s) can be directly deposited in your bank account.
- Last year's Federal and New York State Return(s) assuming you filed returns last year.

Forms showing income

Below is a list of forms you might have received. You may not have received all or even any of these forms, please bring all that apply.

- Form W-2 from each employer showing earned income
- Form 1099-G showing unemployment compensation and state or local tax refunds
- Form SSA-1099 form showing the total Social Security benefits paid to you for the year
- Form RRB-1099, Tier 1 Railroad Retirement benefits
- Form 1099-INT and/or 1099-DIV showing interest and dividends proceeds
Form 1099-B showing sales of stocks and bonds. Also bring documentation showing the original purchase price of your sold assets
- Form 1099-R form if you received a pension, annuity, or IRA distribution
- Form 1099-Misc
- All forms and canceled checks indicating federal and state income tax paid (including quarterly estimated tax payments)

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- Any other tax forms showing income you received even if they are not listed here.

Reducing your taxes by taking deductions

Most taxpayers have a choice of taking either a standard deduction or itemizing their deductions in order to reduce that amount of taxable income. If you have a substantial amount of deductions, you may want to itemize. In order to itemize your deductions, please bring the following items:

- Form 1098 showing any home mortgage interest
- Forms 1098-T and/or 1098-E forms (Tuition and Student Loan Interest payments)
- Form 1095A if you purchased health insurance through Marketplace (Exchange), and any exemption correspondence from the Marketplace (if applicable)
- A list of medical/dental expenses (including doctor and hospital bills and medical insurance premiums), prescription medicines, costs of assisted living services, and bills for home improvements such as ramps and railings for people with disabilities
- Documents showing Federal, state and local (school and real estate) taxes paid for the tax year
- Summary of contributions to charity both cash and non-cash
- Health insurance premium payments
- Transportation costs for medical appointments and volunteer activities are also deductible, so bring records showing miles traveled, parking fees and tolls.

Reducing your taxes by taking credits

Tax credits directly reduce the amount of taxes paid. Bring the following, if you have them:

- Dependent care provider information (name, employer ID, or Social Security number) along with amounts paid.