

What to Bring for Your Free AARP Tax Preparation

Government issued proof of identification - photo ID such as driver's license or passport for taxpayer and spouse if married filing joint return.

The **COMPLETED** 8-page *Intake/Interview & Quality Review Sheet*.

Social Security number verification: Social Security cards for you, your spouse and dependents or a Social Security number verification letter issued by the Social Security Administration. Mandatory this year.

An Individual Taxpayer Identification Number (ITIN) assignment letter may be substituted for you, your spouse, and your dependents if you do not have a Social Security number.

Proof of foreign status, if applying for ITIN.

Form 1095-A, if you received health care insurance through the Marketplace, i.e., the New York State of Health.

Birth dates for you, your spouse, and dependents on the tax return.

Wage and other earning statements (Form W-2, W-2G, 1099-R, 1099-Misc. etc.) from all sources.

Form 1099-G if you collected unemployment benefit or had a state income tax refund AND itemized deductions last year. You may need to go online to obtain these.

Form SSA-1099 Social Security Benefit Statement.

Interest and dividend statements from banks and brokerage firms (Form 1099 int or div). Your bank may not issue this to you if your interest or dividend is under \$10. Brokerage firms are not required to send you these forms until the end of February.

A copy of last year's federal and state returns. If you do not bring your last returns, we will not know if you have given us all of the information for items of income, deductions and credits and carryovers of capital losses, contributions, credits and other items. The risk is that something will not be included on your 2021 return. Also, if you are self-employed OR may be eligible for Earned Income Credit, please bring your 2019 tax return.

Any notices you received from the IRS or NYS Taxation, including any notice of return changes or identity fraud.

A blank check if you want your refund to be direct deposited or payment to be automatically withdrawn from your account. Volunteer tax preparers will not keep this check nor any of your other papers.

For a married-filing-joint tax return, **both spouses must be present to sign the required forms.**

You may be entitled to an additional CARES Act Stimulus Payment when you file your 2021 tax return if you did not receive that payment about April 1. Please bring evidence of the amount of Economic Impact Payment already received which is on Notice 1444 which you should have received in the mail about 15 days after receiving your payment.

Total paid for daycare provider and the daycare provider's name, address, and tax identifying number such as their Social Security number or business Employer Identification Number.

Documentation for Itemized Deductions if you do not want the Standard Deduction. The Federal Standard Deduction ranges from \$12,550 for singles and up to \$27,800 for a married couple both over 65. The corresponding figures for NY State are about \$8,000 and \$16,000; you can take the Standard Deduction for Federal and itemize for NY. The IRS caps State and Local Taxes at \$10,000 but Congress **might** change that. NY does not have any cap. If you want to itemize you **MUST** the **2021 Itemized Deduction Worksheet** (see Page 3). We cannot accept bunches of receipts or a number from an earlier tax return as an estimate.

You can deduct up to \$300 (\$600 Married filing Joint) charitable cash contributions even if you do not itemize. Bring documentation.

New for 2021 – you may be able to get a credit on your NY return for part of the Real Estate taxes you paid– bring a copy of your tax bill and information on any checks you may have received from NY for STAR exemptions. Enter the figure on the 2021 Itemized Deduction Worksheet.

If you are self-employed bring an itemized list of self-employment income and related expenses

AARP Tax Aide volunteers **cannot prepare** returns that include rental property, military income, alternative minimum tax, many stock transactions or in other situations where volunteers have not been trained.

The IRS is sending two new letters that you need to bring:

- Letter 6475: “Your 2021 Economic Impact Payments” which will be sent beginning in late January. This confirms the Stimulus Payment you would have received in the spring of 2020
- Letter 6419: “2021 Total Advance Child Tax Credit (Adv CTC) Payments” which are being mailed out now to taxpayers who received advanced payments.

1/8/2022

Adapted from: <http://www.irs.gov/Individuals/Checklist-for-Free-Tax-Return-Preparation>