

Directions for Preparing Tax Packet

All of the information you provide will be handled/controlled/secured per IRS Privacy, Confidentiality and Civil Rights (pub 4299) protection requirements.

1. Items to bring or include in *packet*:

- Photo ID: driver's license or passport, self and spouse
- Social security card or ITIN letters for self, spouse, dependents, or, copy of last year's tax return *if* all persons same as this year
- Identity Protection PIN(IP PIN) if one has been assigned to you, spouse, or dependents
- Bank Account information (if you want to receive direct deposit of refund or mak direct withdrawal payment of taxes
 - Bring voided check, or written Bank Name, Routing number, Account number
 - Bank Account must be in taxpayer or spouse's name!

2. Review and complete/sign [14446 Virtual VITA/TCE Taxpayer Consent \(click here to open attachment\)](#). Add to *packet*.

3. ***Did you receive your Economic Impact Payments (stimulus) in spring/summer 2020 and early January 2021?*** (check your direct deposits or records, govt issued debit card. If you did not receive it, we can claim it on your 2020 tax return.) You will need to tell us, or you can bring written note describing your receipt of stimulus payments to be sure that we capture it!

4. Complete the **yellow form 13614-C** [Intake/Interview \(click to open attachment\)](#). Be sure to complete the back page 15080 Consent, also.

As you fill out the form 13614-C Intake/Interview, please note which of the following documents you will need to bring in order for us to complete your tax return. You are unlikely to require all of those listed, but check to see which are relevant to you. More common items are in **bold**. ***Give particular attention to new for 2020 items, which are italicized.***

- **W-2s**
- **SSA-1099 Social Security**
- **1099-R** retirement or disability income
- ***1099-NEC self-employment (previously was 1099-Misc box 7)***
 - **For self-employed, record of business expenses and income**
- **1099-G unemployment**
- **1098-T** scholarships received/educational expenses
- **1099-DIV, 1099-INT** interest and dividends
- **1099-B, 1099-S** stocks, bonds, real estate 1099-G State tax refund
- 1099-MISC
- Alimony paid/received records
- Record of cash payments received not listed elsewhere
- RRB-1099 Railroad Retirement Benefits
- Schedule K-1 partnership and other income

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- 1099-LTC Long-Term Care reimbursements
- Jury duty income records
- Prize and award income records
- W-2G or other records of gambling income
- 1099-C, 1099-A Credit card or mortgage debt cancelled, home foreclosure
- **Form 1098-E student loan interest paid**
- Record of energy-saving home improvements made
- **Record of childcare expenses paid to licensed day care** (include EIN, name, address of Daycare, or SSN)
- Record of classroom expenses for educators in grades K-12
- **Form 5498 IRA contributions**

- **1095-A Health coverage through the Marketplace Exchange**
- **Health Savings Account?: Form 5498-SA HSA contributions and 1099-SA** record of HSA distributions for allowable expenses (*otc meds, other new items this year*)

- **Charitable donation records** (*new this year: up to \$300 of charitable cash donations can be deducted, even if you do not itemize! eg: Did you donate cash/check to WY Public Radio, local charity, food bank....?*)

Items below, if you itemize deductions, or might be able to itemize. (most people paying on a mortgage itemize, without a mortgage, very few have enough items to deduct that they exceed your standard deduction: single \$12,400, single 65 & older \$14,050//married filing joint \$24,800, 65 and older \$26,100,\$27,400//head of household \$18,650, 65 and older \$20,300.

- Property taxes paid
- Form 1098 Mortgage interest paid
- Amounts paid for medical expenses record, medical mileage

Any other documents pertinent to your tax return, including those received in an envelope marked “important tax document enclosed”

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