Social Security Cards for you, your spouse, and your dependents
Photo id card for you and your spouse
Birth dates for you, spouse and dependents
A copy of last year’s tax return
All supporting forms W-2, 1098, 1099s, etc.
Forms 1095-A, 1095-B or 1095-C (ACA Statements)
Information for “other income”
Information for all deductions and/or credits
Payment to day care provider and associated provider’s tax ID number (or EIN)
For direct deposit of refund, proof of account and bank’s routing number (voided check or bank letter)
For married filing joint, both spouses must be present at the site

IRS VITA/TCE return preparation sites are operated by certified volunteers. Site operating hours and services may be limited. In addition, by law, some sites provide priority services to seniors. Please be advised that you may not be immediately served. Your patience and understanding are appreciated.

Please, check the following website for the Location, Days and Hours of Operation:

https://www.accountingsocietyhc.com/vita-2020/
## Scope of Services

### REQUIRED IDENTIFICATION – **ORIGINALS ONLY** – Photocopies Not Accepted

- **VALID State Issued I.D.**
- **Social Security Card** (for you, your spouse and all dependents you are claiming)

### NY RESIDENCE AND NY INCOME ONLY*

- **NY Resident for the entire 2019 year**
- **Income in Yonkers not accepted**
- **Income Earned in New York ONLY (less than $55,000)**

### TAX FILING SERVICES

- **Individual ONLY – Excludes all Business Types**
- **All Filing Statuses**
  - If Married Filing Jointly, BOTH must be present
- **E – FILE ONLY**
- **Tax Prep for 2019 Tax Year ONLY**
- **Direct Deposit Available - MUST provide voided check or letter from Bank**
- **We ONLY Amend Tax Returns Prepared at this site**

### TAX DOCUMENTS – **ORIGINALS ONLY** – Photocopy Not Accepted

#### ACCEPTED TAX DOCUMENTS

- **W2**
- **1099-DIV: Dividends and Distributions – NO CAPITAL GAINS**
- **1099-G: Government Payments**
- **1099-INT: Interest Income**
- **1099-MISC: Miscellaneous Income – Nonemployee Compensation ONLY**
- **SSA-1099: Social Security Benefit Statement**
- **1099-R: Distributions from Pensions, or Insurance Contracts**
- **1098-E is for the interest paid on qualified student loans**
- **1098-T details tuition and related fees during the year**
- **1095-A: Health Insurance Marketplace Statement**

#### NOT ACCEPTED "Other Income" and Payments Made

<table>
<thead>
<tr>
<th>If you received the following &quot;other income&quot;:</th>
<th>If you incurred the following:</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1099-C: Cancellation of Debt</strong></td>
<td><strong>Contribution to Traditional IRA</strong></td>
</tr>
<tr>
<td><strong>1099-CAP: Changes in Corporate Control and Capital Structure</strong></td>
<td><strong>1098 MORTGAGE</strong></td>
</tr>
<tr>
<td><strong>1099-K: Third Party Network Transactions</strong></td>
<td><strong>Alimony Payments</strong></td>
</tr>
<tr>
<td><strong>1099-LTC: Long Term Care Benefits</strong></td>
<td><strong>Penalties forfeited because of premature withdrawal of funds</strong></td>
</tr>
<tr>
<td><strong>1099-OID: Original Issue Discount</strong></td>
<td><strong>Retirement plan savings for the self-employed</strong></td>
</tr>
<tr>
<td><strong>1099-PATR: Taxable Distributions Received from Cooperatives</strong></td>
<td><strong>Required repayments of supplemental unemployment compensation</strong></td>
</tr>
<tr>
<td><strong>1099-S: Proceeds from Real Estate Transactions</strong></td>
<td><strong>Expenses of performing artists</strong></td>
</tr>
<tr>
<td><strong>1042-S: Foreign Person’s U.S. Source Income</strong></td>
<td><strong>Expenses of state officials</strong></td>
</tr>
<tr>
<td><strong>1042-S: Foreign Person’s U.S. Source Income</strong></td>
<td><strong>Expenses for Army Reserve members</strong></td>
</tr>
<tr>
<td><strong>1042-S: Foreign Person’s U.S. Source Income</strong></td>
<td><strong>Certain deductions of life tenants and income beneficiaries of property</strong></td>
</tr>
<tr>
<td><strong>1042-S: Foreign Person’s U.S. Source Income</strong></td>
<td><strong>Reforestation expenses</strong></td>
</tr>
<tr>
<td><strong>1042-S: Foreign Person’s U.S. Source Income</strong></td>
<td><strong>Jury duty pay given to the employer</strong></td>
</tr>
<tr>
<td><strong>1042-S: Foreign Person’s U.S. Source Income</strong></td>
<td><strong>Clean fuel vehicles</strong></td>
</tr>
<tr>
<td><strong>1042-S: Foreign Person’s U.S. Source Income</strong></td>
<td><strong>Moving expenses</strong></td>
</tr>
</tbody>
</table>