

# TAXPAYER CORNER

## WHAT TO BRING?

- 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

## YOU MUST BE A U.S. CITIZEN OR PERMANENT RESIDENT

REQUIRED IDENTIFICATION – <b>ORIGINALS ONLY</b> – Photocopies Not Accepted	
<ul style="list-style-type: none"> <li>● VALID State Issued I.D.</li> </ul>	<ul style="list-style-type: none"> <li>● Social Security Card (for you, your spouse and all dependents you are claiming)</li> </ul>
NY RESIDENCE AND NY INCOME ONLY*	
<ul style="list-style-type: none"> <li>● NY Resident for the entire 2019 year</li> <li>● Income in Yonkers <b>not</b> accepted</li> </ul>	<ul style="list-style-type: none"> <li>● Income Earned in New York ONLY (<b>less than \$55,000</b>)</li> </ul>
TAX FILING SERVICES	
<ul style="list-style-type: none"> <li>● Individual ONLY – Excludes all Business Types</li> <li>● E – FILE ONLY</li> <li>● Direct Deposit Available - <b>MUST provide voided check or letter from Bank</b></li> </ul>	<ul style="list-style-type: none"> <li>● All Filing Statuses If Married Filing Jointly, BOTH must be present</li> <li>● Tax Prep for 2019 Tax Year ONLY</li> <li>● We ONLY Amend Tax Returns Prepared at this site</li> </ul>
TAX DOCUMENTS – <b>ORIGINALS ONLY</b> – Photocopy Not Accepted	
ACCEPTED TAX DOCUMENTS	
<ul style="list-style-type: none"> <li>● W2</li> <li>● 1099-DIV: Dividends and Distributions – NO CAPITAL GAINS</li> <li>● 1099-G: Government Payments</li> <li>● 1099-INT: Interest Income</li> <li>● 1099-MISC: Miscellaneous Income – Nonemployee Compensation ONLY</li> <li>● SSA-1099: Social Security Benefit Statement</li> </ul>	<ul style="list-style-type: none"> <li>● 1099-R: Distributions from Pensions, or Insurance Contracts</li> <li>● 1098-E is for the interest paid on qualified student loans</li> <li>● 1098-T details tuition and related fees during the year</li> <li>● 1095-A: Health Insurance Marketplace Statement</li> </ul>
<b>NOT ACCEPTED "Other Income" and Payments Made</b>	
If you received the following "other income":	If you incurred the following:
<ul style="list-style-type: none"> <li>● 1099-C: Cancellation of Debt</li> <li>● 1099-CAP: Changes in Corporate Control and Capital Structure</li> <li>● 1099-K: Third Party Network Transactions</li> <li>● 1099-LTC: Long Term Care Benefits</li> <li>● 1099-OID: Original Issue Discount</li> <li>● 1099-PATR: Taxable Distributions Received from Cooperatives</li> <li>● 1099-S: Proceeds from Real Estate Transactions</li> <li>● 1042-S: Foreign Person's U.S. Source Income</li> </ul>	<ul style="list-style-type: none"> <li>● Contribution to Traditional IRA</li> <li>● 1098 MORTGAGE</li> <li>● Alimony Payments</li> <li>● Penalties forfeited because of premature withdrawal of funds</li> <li>● Retirement plan savings for the self-employed</li> <li>● Required repayments of supplemental unemployment compensation</li> <li>● Expenses of performing artists</li> <li>● Expenses of state officials</li> <li>● Expenses for Army Reserve members</li> <li>● Certain deductions of life tenants and income beneficiaries of property</li> <li>● Reforestation expenses</li> <li>● Jury duty pay given to the employer</li> <li>● Clean fuel vehicles</li> <li>● Moving expenses</li> </ul>