

Directions for Preparing **Packet** for 2022 tax returns

1. Items to **bring/ 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 2022 and if don't have original documents)
- **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 make 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!
- **2021 tax return** (optional, but may be helpful!)

2. **Review and complete/sign 14446 Virtual VITA/TCE Taxpayer Consent** (form in the *packet*).

3. **Complete the yellow form 13614-C Intake/Interview** (form in the *packet*). Be sure to complete/sign the back page 15080 Consent.

4. As you fill out the form 13614-C Intake/Interview, **collect/bring any of the following documents** that apply to you. (You are unlikely to require many of those listed, but check to see which apply to you.) More common items are in **bold**.

- **W-2s**
- **SSA-1099 Social Security**
- **1099-R** retirement or disability income
- **1099-NEC self-employment**
 - **For self-employed, bring record of business expenses, including business miles and income**
- **1099-miscellaneous**
- **1099-G unemployment**

- **1099-DIV, 1099-INT** interest and dividends
- **1099-B, 1099-S** stocks, bonds, real estate 1099-G State tax refund

- **5498 IRA contributions**

- **1098-T** tuition, scholarships received
 - Record of educational expenses (books, laptop, required fees...)
- **1098-E student loan interest paid**

- **Classroom expenses** for educators in grades K-12- up to \$300

- **Record of childcare expenses paid to licensed day care** (include EIN, name, address of Daycare, or caregiver's SSN)

- **1095-A Health coverage through the Marketplace Exchange**
- **5498-SA HSA contributions and 1099-SA** record of HSA distributions for allowable expenses (**including otc meds, menstrual items-newly allowed expenses**)

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- **1099-C, 1099-A Credit card or mortgage debt cancelled**, home foreclosure
- **Energy-saving home improvements** (windows, doors...energy saving appliances)
- **W-2G** or other records of gambling income (also bring losses if you itemize)
- Alimony paid/received records
- Record of cash payments received not listed elsewhere
- RRB-1099 Railroad Retirement Benefits
- Schedule K-1 partnership and other income
- 1099-LTC Long-Term Care reimbursements
- Jury duty income records
- Prize and award income records (eg: your Olympic Gold medal award!)

Items below, if you itemize deductions, or might be able to itemize. (most people paying on a mortgage itemize. Without a mortgage, few have enough items to deduct that exceed the standard deduction: single \$12,950, single 65 & older \$14,700//married filing joint \$25,900, mfg 65 and older \$27,300/28,700, //head of household \$19,400, hoh 65 and older \$21,150---differs for mfSeparately and if you are a dependent.

- **Property taxes** paid
- **1098 Mortgage Interest**
- **Medical expenses**, medical mileage (if exceeds 7.5% of adjusted gross income)
- **Charitable donations**
- **Home sale or purchase documents**

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

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