

# Free Income Tax Preparation

for low-income families and individuals.

Completed on-site, by appointment only.

## MY TAX APPOINTMENT:

Date: \_\_\_\_\_

Time: \_\_\_\_\_

Location: **Beverly Bootstraps, 35 Park Street, Beverly**

## When you come to your appointment, be sure to bring:

- Photo ID** such as Driver's License or Passport;
- Social Security cards** for you, your spouse, and all dependents;
- Printed, Completed Form 15080** (Consent to Disclose Tax Return Information to VITA/TCE Tax Preparation Sites);
- A copy of last year's tax return;**
- Income information:**
  - Wages and earnings (Form W-2, 1099-Misc, 1099-NEC, 1099-K) from all employers;
  - Social Security (SSA-1099), pensions or IRA (1099-R);
  - Interest from banks (1099-INT) and dividends (1099-DIV);
  - Unemployment Compensation (1099-G);
  - Gambling or Lottery winnings (W-2G);
- Health insurance information:**
  - Health Insurance Cards and coverage information (1095-A, 1095-B, or 1095-C, 1099-HC);
- Information about Expenses:**
  - Childcare expenses: statement from daycare provider with amount paid and the provider's tax ID number;
  - Education expenses: Tuition: 1098-T, Student loan interest: 1098-E;
- Homeowners 65 and over:**

Property tax and excise tax bills, water/sewer bills;
- Bank account information:**

Routing and account numbers for direct deposit, such as a blank check, which will be returned to you;
- Both spouses must be present to file a married-filing-jointly tax return, and both must sign the required forms.**