Preparing for your 2023 Tax Return

Pick up a Tax Packet which includes:

- **These instructions**
- **Form 13614-c (Intake Booklet): Fill this out as best you can and bring it with you to your appointment.**

If filing jointly with your spouse, both of you must come to the appointment.

If you are filing for someone else, you must bring a Power of Appointment.

Documents to Bring

___ **1.** **Photo Identification** for you and your spouse and **Tax Identification** for you, your spouse, and all dependents. **Tax Identification must be one of the following**:

(1) Social Security card, or
(2) Social Security statement of benefits (SSA-1099), or
(3) Verification letter from the Social Security Admin., or
(4) ITIN Letter

(Military IDs and other substitute documents are not acceptable)

___ **2.** **Copy of your 2022 Federal and NC tax returns and (if available) accompanying tax documents** If your taxes were done here last year, please bring the tax envelope we gave you and everything in it.

___ **3.** If you want direct deposit or debit (preferred by IRS and much quicker), bring:

- A **blank check** (or a legible photo copy of a check)
- A card from the bank with routing & account numbers
- ***Deposit slips are NOT acceptable***.

___ **4.** **All "Tax Document" forms** received for the **2023** tax year:

A. Social Security benefit (SSA-1099)
B. W-2 forms from each employer and W-2G (lottery or gambling winnings)
C. 1099 forms: 1099-INT, 1099-DIV, 1099-R (pensions, IRAs, 401Ks), 1099-NEC, 1099-MISC, 1099-G (unemployment compensation), 1099-S (sale of home), RRB-1099 (railroad retirement), etc.
  - Any Interest, Dividend, or similar information not on a 1099 form
D. Form 1095-A, if you had Marketplace health insurance
E. Form 1098-T and documentation on scholarships & **all** education expenses (including who paid which expenses)
F. Anything other papers labeled "Tax Documents" that you received in the mail
G. State tax refund statement (usually on a post card)

___ **5.** Estimated tax payments for federal & state **taxes paid** not already listed

___ **6**. **Business or self-employed** income and related expenses (including non-commuting mileage)

___ **7**. 1099-B and brokerage statement showing sales of **stocks, bonds, mutual funds.** Also, information about the cost, date acquired, sales price, and date of sale. Let us know if you got the property by inheritance or gift.

___ **8.** **Childcare** provider information: name, employer ID/ SSN, address. Amounts paid for each child.

___ **9**. If you expect to itemize deductions (must be more than your NC standard deduction: Single: $12,750, Married Couple: $25,500), bring information:

- Mortgage interest and insurance
- Real estate and vehicle taxes
- Medical expenses (if over 7.5% of your income)
- Charitable contributions (Cash and non-cash).

Rufty Holmes Senior Center has a form to help: **ItemizedDeductionsIntake&ClientTakeHomeList**

___ **10**. Any other documents that might affect your tax return, such as **student loan interest**, **alimony**, repayment of first-time homebuyer credits from 2008 (or 2009 if the home ceased to be the main home

We CANNOT prepare your return if you:

1. **Owe any special taxes (such as alternative minimum tax or household employment taxes)**
2. **Have business income with net loss OR with expenses over $35,000 OR have inventory OR home office**
3. **Received a 1099-S for the sale of any real estate other than a personal residence**
4. **Have farming income**
5. **Have rental income with any expenses or depreciation**
6. **Have income as a minister (active or retired)**
7. **Have loss with bankruptcy or want to get an adoption credit.**