NAME: **DATE:** **TIME:**

Josephine County Tax-Aide: What to Bring to your Appointment

★ **Must Bring!**

Identification

☐	**Photo ID** – Driver's license or state ID preferred ★
☐	**Social security cards** or ITIN numbers and **birthdates** for all on the return ★
☐	Social security or ITIN number for ex-spouse if receiving or paying alimony
☐	IRS identity protection PINs (IPPIN) if anyone has one
☐	**A copy of the previous year's return -- Don't Have?? -- Go to the IRS website and get a copy: https://www.irs.gov/individuals/get-transcript** ★

Income information

☐	W-2 forms from all employers
☐	W-2G forms for any gambling winnings and a record of losses if available
☐	SSA-1099, RRB-1099 social security forms -- Have lump sum payment for multiple years? Need tax returns for those years.
☐	1099-R, RRB-1099-R, CSA-1099/R forms from annuities or pensions If box 9b has an amount shown, **the date of retirement or first annuity payment**
☐	1099-MISC forms for oil/gas royalties, miscellaneous or self-employment income, jury duty
☐	1099-B forms, often included in **broker statements** (bring ALL broker statement pages)
☐	1099-C cancellation of debt (for non-business credit cards only)
☐	1099-DIV forms, often included in broker statements
☐	1099-G forms from state refunds or unemployment payments
☐	1099-INT forms from bank accounts. If interest is under $10, one may not be issued, so bring the amount of interest (it's still taxable)
☐	1099-OID forms, often included in broker statements
☐	1099-S forms from real estate transactions, if any. If you sold a home, bring sales and original purchase document also.
☐	K-1s from oil/gas royalties, partnerships or trusts
☐	Rental received (**only land** – all other rentals need professional help unless active military)
☐	Alimony received (and ex-spouse social security number)
☐	Self-Employment: A summary of cash income
☐	Self-Employment: 1099-K forms showing income payments
☐	Self-Employment: 1099-MISC forms for work done for others
☐	Self-Employment: A list of all expenses related to your business
☐	Self-Employment: Miles driven (actual costs and depreciation need professional assistance)

Deductions – Summarized and totaled

☐	Medical expenses – listed separately for each party on tax return
☐	Contributions – Miles driven, please estimate the value of non-cash donations
☐	1098 forms showing mortgage interest payments
☐	1098-E student loan interest statements
☐	1098-T tuition statements
☐	Scholarship information – amount, restrictions on use of funds
☐	Details of education expenses – tuition, books and equipment, how and when paid for (student's account printout if possible)
☐	Classroom supply expenses for teachers
☐	Energy Credit postcard/notification from Oregon
☐	Child care costs – name, address, tax ID, amount paid

Other

☐	1095-A for ACA Premium Tax Credit information
☐	1099-LTC forms to document long term care benefits
☐	1099-Q forms from qualified education programs
☐	1099-SA forms showing distributions from health savings accounts
☐	5498 forms showing IRA contributions
☐	5498-SA forms showing health savings account information
☐	Estimated tax payments made
☐	Prior year refund applied to this year
☐	Carry-over capital gains losses from the previous year
☐	Carry-over state credits from the previous year(s) such as Child Care Credit
☐	Any tax-related communication from Oregon or the IRS during the past year
☐	Routing and Account numbers from your bank account for direct deposit of refund or direct debit of amount due. Must be a check or verified numbers from your bank. ★

Reminder –

- **Taxpayer is/are responsible for the accuracy of their return.**