COME PREPARED!!
Bring this completed checklist with you to the interview.

Items 1-4 apply to all taxpayers. Items 5-17 may or may not apply; complete *only if applicable*. Please complete items to the best of your ability. Bring everything with you to the interview.

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1. Taxpayer (& spouse if Married Filing Joint -MFJ) must have a government ID with photo and either their Social Security card (copy OK), SS statement (SSA-1099), or last year's return prepared by Taxaide.
2. Fully complete enclosed 8-page Intake/Interview & Quality Review booklet
   a. Pg1: complete all applicable fields; we need each dependent's date of birth *& social security #*. (If applicable) you must bring your IRS Identity Protection PIN # (it changes every year). if using direct deposit/debit, we need a voided check (preferred) or other documentation of bank routing and account #.
   b. Pg 2&3: Check every applicable box; for each check item. you must have and bring the appropriate documentation, usually one or more of the documents listed on that line in parentheses.
   c. Pg 4: All entries are optional (helps AARP Foundation grant funding)
   d. Pg 5-8: Contains three separate optional consent forms. Sign & date ONLY those consents you agree to; otherwise leave blank. If MFJ, *both* spouses must sign & date *prior* to first appointment.
3. Bring a *paper* copy of all relevant tax forms, including brokerage statements. Print a copy of any electronic forms. We prefer copies over originals.
4. Bring your *most recently* filed return (TY2023, TY2022)

NOTE: If any of items 5, 6, 7, 8, or 9 below apply, you *must* complete the associated worksheet. The Worksheets may be downloaded and printed from http://wimberleytaxaide.info/; copies may be available at the Senior Center.

5. ***If*** itemizing, complete the Itemized Deductions worksheet.
6. ***If*** self-employed, complete the Self-Employed Schedule C worksheet.
7. ***If*** claiming education credits, complete the Education Credits Worksheet. You should have received and bring a form 1098-T from the school.
8. ***If*** you sold your home (primary or secondary residence) in 2024, complete the Home Sale Worksheet
9. ***If*** you had rideshare income, complete the Rideshare Organizer worksheet

10. ***If*** anyone listed on your return had Marketplace Healthcare coverage (Affordable Care Act or "Obamacare") at any time in 2024, you *must* bring a copy of your Form 1095A; we can't do the return without it.
11. ***If*** claiming child or dependent care expenses you *must* have and bring a letter from the provider giving amount paid and name, address, and SSN or EIN of provider.
12. ***If*** you had a capital loss carry-over from last year, we will need both the amount and whether short or long term (info available on last year's return, Schedule D).
13. ***If*** you received First Time Homebuyer Credit in 2008: Bring (copy of) Form 5405 from last year's return. (Only for TY2023 returns and earlier)
14. ***If*** receiving or paying Alimony: We will need date of divorce decree or separation agreement; or new date if it was modified after 2018 to comply with TCJA. If you paid alimony, we will need SSN of recipient.
15. ***If*** you made Estimated Payments to the IRS in 2024 or applied any of last year's refund to this year's taxes, we will need the dates and amounts paid.
16. ***If*** you and/or your spouse are a K-12 educator or administrator, and you are claiming an educator adjustment credit, we will need from *each* the amount of expenses claimed and estimated number of hours worked in 2024.
17. ***If*** claiming the home energy credit, we will need to see documentation from the *manufacturer* or a *signed* letter from the vendor that the improvement/ item meets Energy Star program 6.0 requirements. For detailed info about qualifying improvements and certification requirements, visit the Energy Star website:

https://www.energystar.gov/about/federal_tax_credits/non_business_energy_property_tax_credits

Item cost:_________ Installation cost:_________ Date paid:____________
Total home energy credits claimed in prior years after 2005:____________