



# What to bring?

- Proof of identification – government Issued photo ID. If married, for both spouses
- Social Security cards for you, your spouse and dependents
- An Individual Taxpayer Identification Number (ITIN) assignment letter may be substituted for you, your spouse and your dependents if you do not have a Social Security number
- Birth dates for you, your spouse and dependents
- Wage and earning statements (Form W-2, W-2G, 1099-R, 1099-Misc) from all employers or Wage and Income Transcripts from IRS and State, if applicable
- Interest and dividend statements (Forms 1099-INT, 1095-DIV)
- Information for all other income. If self-employed, see the second page for additional documents needed
- Information for all deductions/credits (summarized)
- Total paid to day care provider and their tax ID number
- Form 1095-A for health insurance through Marketplace or forms 1095-B or 1095-C for other types of health insurance, if available
- Health Insurance Exemption Certificate, if applicable
- Bank routing and account number for direct deposit, if applicable
- A copy of last year's tax return, if available
- To file taxes electronically on a married-filing-joint tax return, both spouses must be present to sign the required forms

# Small Business Tax Preparation Documents

If your source of income is through self-employment by providing a service such as housekeeping, hair dresser, daycare, landscaping, or any other service where you are paid in cash or by check, IRS considers it a small business. You will need the following record keeping documents to have your taxes prepared at one of our VITA sites. City of Phoenix VITA cannot prepare tax returns if business had any losses or business expenses larger than \$25,000.

## **Record keeping for a small business:**

- Business checkbook
- Daily summary of cash receipts

## **Items you will need to verify record keeping:**

### GROSS RECEIPTS (Income Earned)

Gross receipts are the income you received from your business. Documents to support gross receipts include the following:

- Cash register tapes
- Bank deposit slips
- Bank account statements
- Receipt books
- Invoices
- Credit card charge slips
- Forms 1099-MISC.

### BUSINESS EXPENSES

Expenses are the cost you incur (other than purchases) to carry on your business. To be deductible, a business expense must be both ordinary and necessary. Documents to support expenses incurred during the year include the following:

- Canceled checks
- Cash register tapes
- Bank account statements
- Credit card sales slips
- Invoices
- Petty cash slips for small cash payments

### AUTO EXPENSES

- For car expenses verification of mileage includes, the date you started using it for business, the mileage for each business use, and the total miles for the year.

### OFFICE IN THE HOME

To qualify to deduct expenses for business use of your home, you must use part of your home:

- Exclusively and regularly as your principal place of business