



## What to bring?

- Completed IRS Intake/Interview form (13614-C)
- 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 (birth certificates are not required)
- Wage and earning statements (Form W-2, W-2G, 1099-R, 1099-Misc, 1099-NEC) from all employers or Wage and Income Transcripts from IRS and State, if applicable
- Interest and dividend statements (Forms 1099-INT, 1099-DIV)
- Information for all other income. If self-employed, see the second page for additional documents needed
- Tuition statement (Form 1098-T), if applicable and a print-out from college financial office showing account transactions such as tuition and other expenses paid and scholarships used, for the entire tax year
- Information for all deductions/credits, including donations and medical expenses (summarized). Receipts for cash donations.
- Total paid to day care provider and their tax ID number
- Form 1095-A for health insurance purchased through Marketplace (required) or forms 1095-B or 1095-C for other types of health insurance (if available)
- Bank routing and account number for direct deposit, if applicable
- A copy of last year's tax return, if available
- Economic Stimulus Payment (EIP) letter (if not available, must know the exact amount received)
- To file taxes electronically on a married-filing-joint tax return, both spouses must be present during the pick-up appointment 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 \$35,000.

### **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 and/or 1099-NEC

#### 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 the vehicle for business, the total mileage for each business use, and the total miles for the year