



2018 Income Tax Preparation Checklist
Getting Help to Prepare Your Taxes
What to Bring With You
Income Guideline \$65,000

If you need help completing tax forms, a United Way of Central Jersey volunteer can help you.

Bring these items with you:

- Photo ID** any valid Government/State/City/School ID
- Completed Intake Form 13614-C
- Copy of 2017 tax return
- Social Security card or (ITIN)** for you, your spouse and any dependents. Tax returns will not be prepared without the Social Security # or ITIN letter.
- Proof of Health Insurance Coverage:** 1095-A, 1095-B or 1095-C
- Income documentation including:
 - Wage and Income statement(s) Forms W-2, W-2G, 1099 MISC, 1099R
 - **Cash** Income with documentation (Nature of business, related expenses)
 - Interest and dividends Income statements
 - Social Security Benefits statement
- **Direct Deposit information for Savings & Checking A/C:** Routing & account numbers. Fastest & safest way to receive your refund. **Incentives offered for putting some of your refund into your savings account. Savings Account required!**
- **If any of the following apply, please bring documentation with you:**
 - Child/Day Care expenses, including provider's Name, Address and EIN #
 - Mortgage bank/company statements
 - Business expenses for any 1099-MISC/CASH received (**25,000 max. expenses deducted**)
 - Alimony paid or received
 - Any IRS or State tax notices received
 - Property tax paid (statement)
 - Rent paid in 2018 - Name must be on lease to claim property tax credit on NJ state return
 - Unreimbursed out of pocket medical expenses – (premiums paid, doctors & dentists, prescriptions, co-pays – add separately, medical miles)
 - Charitable donations (cash & checks) – Tally Non-Cash donations separately)
 - 1098-T from college & a **printout of student's college account**. Student loan interest statement for interest paid on loans (1098-E)
 - Additional forms of income such as:
 - Prizes & awards
 - Scholarships and fellowships
 - Lottery/gambling winnings
 - Unemployment Income - please print online or get a copy from the unemployment office
 - State Income tax refunds

Lost documents? Please call the appropriate agencies that issued them for duplicate copies.

LIMITED SCOPE OF VITA PROGRAM:

1. Prepares **only** Individual Tax return – No partnership or corporate returns prepared.
 2. **Have a small business or self employed:** - \$25,000 is the maximum business expense deduction allowed provided there is business income. **A business loss cannot be taken without business income.** Taxpayers with a business loss, \$0 business income, or with expenses in excess of \$25,000 are advised to go to a **Paid Preparer.**
 3. **Other Limitations:**
 - Must not have had a **net loss from the business**
 - Had only 1 business with no employees
 - **Business use of home deduction disallowed** – even if part of the home was used in the business.
 - **Depreciation and amortization deduction will not be taken**
 - **Only mileage expenses allowed, actual expenses cannot be used**
 - Credit card payments receipt that are not already includable in income
 - Had no inventory at any time during the year.
 - Must have used the cash and not the accrual method of accounting
2. **Rental Income:** Limited returns prepared with Income from property rental.

Married Filing Joint returns:

The signatures of both spouses are required on form (8879).

Married Filing Separate returns:

The SSN and date of birth of spouse is required on the tax return

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The VITA Program requires all returns, without exceptions to be electronically filed unless there is a valid reason to be determined by the VITA Preparer.

Appointment needed at all locations: www.uwcj.org

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