Checklist for how to prepare for your Villages Tax-Aide appointment

1. Completed **Intake/Interview & Quality Review Form**
    a. This can be obtained on line or at any of our sites when they are open
    b. This MUST be completed before you can see the tax counselor
2. Bring your **Driver's License** or other official government ID
3. **Remove** all of your tax documents **from the envelopes**
4. Put your tax documents in the following order:
    a. **1099-SSA statement** (or **social security card)**
        i. **Put SSA statement or SS card FIRST**
    b. **W2s (wages and salary)**
    c. **1099-INT /1099 Div (**Interest and Dividends)
    d. **1099-Rs** (IRA/Pension Distributions, Railroad Retirements)
    e. **1099-B Brokerage Statements**
    f. **1099-NEC, 1099-Misc Statements**
    g. **Schedule K-1 (**we can't do all K-1s). Please ask us.
    h. **Other income** (gambling winnings, other compensations, cancellation of debt)
    i. **If you are itemizing, paperwork documenting your medical/dental costs, state & local taxes, charitable contributions, etc.**
        i. An Itemized Deduction form be obtained on line or at any of our sites when they are open
5. Bring your **2022 Tax Return**
6. Bring **a voided check** if you want your refund direct deposited or payment made by direct debit
7. If indicated, bring the **Death Certificate if a taxpayer died in 2023**

Once you arrive for your appointment, please remember that:

1. You need to **keep your Driver's license or ID available for both the tax counselor and quality reviewer.**
2. O**ne person will need to remain in the tax preparation room.**
3. Allow **2-3 hours total time** for tax preparation**.**