

# Checklist to Prepare for your Villages Tax-Aide appointment

## You need to bring the following with you:

- Completed current year's Intake/Interview & Quality Review Booklet which can be obtained online or at any of our sites when they are open. This **MUST** be completed before you can see the tax counselor.
- Your Driver's License or other official government issued photo ID. Your ID will be checked at all steps.
- Last year's tax return
- This year's tax documents. (See Organizing Your Documents below)
- If anyone on your return had an IRS Identity Protection Pin last year, a PIN for Tax Year 2024 is needed this year. The number changes every year so be sure to bring the **current** letter from the IRS.
- If anyone on your return died last year or this year, bring their Death Certificate.
- Blank check if you want your refund direct deposited or payment made by direct debit

## Organizing Your Documents:

- Remove all your tax documents from the envelopes.
- Using **last year's tax return** and Summary sheet check to see that you have received all your tax documents.

## Put your tax documents in the following order:

### Income

- Put 1099-SSA statement (or social security card) first.
- Identity Pin letter, if applicable
- W2's (wages and salary)
- 1099-Rs and RRB-1099 (IRA/Pension Distributions, Railroad Retirements)
- Documentation of QCD (Qualified Charitable Contribution)
- 1099-INT /1099 DIV (Interest and Dividends)
- 1099-B Brokerage Statements (ALL PAGES) (may include 1099-INT and 1099-DIV)
- Capital loss carryover information if applicable from last year's return
- 1099-NEC, 1099-MISC
- Self-employment income and expenses using the Self-employment worksheet available on our [website](#) and bring it with you.
- Schedule K-1 (*we cannot do all K-1s*). Please ask us.
- Other income (gambling winnings, other compensations, cancellation of debt, etc.)

### Deductions

- If you are itemizing deductions, complete and bring the **Itemized Deduction Worksheet** which can be obtained on our [website](#) or at any of our sites when they are open.
- Energy Credits – Only those energy products listed on [www.energystar.gov](http://www.energystar.gov) are eligible for a tax deduction.  
Bring: The invoice from the contractor showing make and model number of the item purchased, full price paid and labor costs. Certificate showing Energy Star rating  
Note that Solar (including solar tubes) is Out of Scope for Tax-Aide
- Other credits – costs for child care and education.

### Health Insurance

- Form 1095-A if anyone on your tax return had health insurance from [www.Healthcare.gov](http://www.Healthcare.gov) .

Once you arrive for your appointment, please remember that one person needs to remain in the tax preparation room at all times during the process.

Allow 2-3 hours total time for tax preparation.