

## CSVP FREE INCOME TAX PROGRAM CHECKLIST

### Be Prepared for your Tax Appointment!

#### Please Bring the following items:

1. Photo identification
2. The completed (attached) 13614-C Intake/Interview form (an online fillable PDF is available at <https://www.irs.gov/pub/irs-pdf/f13614c.pdf>) If you use the online form, you must print it and bring it with you.
3. Social Security card(s) - (this is required for all dependents and taxpayers)
4. A copy of last year's Federal and State return
5. Birth dates for you, your spouse, and any dependents on tax return
6. Wage and earning statements (W2's and 1099's); Social Security Benefits (1099-SSA) plus any pensions, annuities, and IRA/401(k) distributions (1099-R's)
7. Interest and dividend statements (1099 INT; 1099 DIV; 1099-B)
8. Unemployment Compensation (1099-G)
9. State refunds (1099-G)
10. Any cancellation of debt (1099-C)
11. Gambling Winnings (W-2G)
12. Any miscellaneous income reported on a **1099-MISC** or **1099-NEC**
13. The **Economic Incentive Payments** amounts received, last spring (\$1200/500) and this winter (\$600); these amounts are NOT taxable by either the IRS or CA, but we want to ensure you received your full amount due.
14. Health Insurance Information: (a 1095-A and FTB 3895 is required for health insurance coverage obtained through Covered California (the "marketplace"))
15. A blank or voided check-routing numbers and account numbers (deposit of refunds or direct debit of a balance due)
16. Any other relevant information about **income, expenses** and **deductions** (complete the deductions worksheet).
17. If there will be a college student on the tax return, a Tuition Statement – **1098-T** is required
18. Business income and expenses for Schedule C—**We ONLY do Schedule C returns, if there's a profit and expenses are Under \$35,000; without home use, inventory, or depreciation. If you are self-employed, complete the self-employment worksheet**

#### We CANNOT provide Income Tax Assistance for the following:

- Rentals (Schedule E – house or room rentals)
- Out-of-state returns
- Married filing separate returns

#### Tax Appointment Location:

Goebel Adult Community Center

1385 E. Janss Road, Thousand Oaks, 91362

**Please bring all attached forms filled out.**

**Remember to bring a Face Mask.**

**They are mandatory and we will not be providing them.**