

INFORMATION FOR TAXPAYERS

We look forward to seeing you and assisting you in preparing and filing your 2023 tax returns (Federal and AL). I (Joel P.) will again be one of the volunteers.

When you come to your appointment time, please bring the following documents with you:

1. Completed Intake/Interview Sheet (Yes, you completed the same form last year, but we need it done fresh this year). You got this sheet of eight pages today.
2. Your copy of 2022 tax return (Federal and AL).
3. All tax information documents for tax year 2023. This includes documents you received in the mail (for example, W-2, 1099-R, SSA-1099, 1099-INT, etc) and any lists you normally provide us.
4. If you itemize deductions, show separate medical expense subtotals (Note: We do not have to see details; we only need the subtotals) for (a) medical and dental insurance (but not Medicare premiums since we enter those from SSA-1099 and those premiums are automatically carried forward to this section), (b) doctors, dentists and other medical providers (but not hospitals, which are included below), (c) prescriptions, (d) X-Rays, lab work, etc. (e) hospital, (f) medical aids (hearing aids, eyeglasses, wheelchairs, etc.), (g) medical mileage, (i) other medical expense.
5. If you choose to receive any refund as a direct deposit to your bank account, bring a blank check for the bank account information.
6. If we prepared your 2022 tax return and you are not listing additional dependents this year, we do not need social security cards. If you are listing additional dependents this year, we need to see social security cards of only the added dependents.
7. If we did not prepare your 2022 tax return, we need social security cards of all persons (taxpayers and dependents) to be listed on your 2022 tax return.
8. Driver's license (both spouses if married filing jointly).

We are using the same procedures as last year. You consent to leave your tax documents with us and allow us to transfer your documents to other volunteers to prepare and review your tax return. You will sign an inventory list of documents you are leaving with us.

We expect to complete your tax return within a week. At your first appointment, we will make a second appointment where we will (a) return all documents to you that we received at the first appointment and (b) provide you a copy of your completed tax return (Federal and AL). You will sign forms (a) acknowledging we prepared your return based on the information you provided us, (b) verifying we returned all documents to you and (c) agreeing we provided you a copy of your Federal and AL tax returns. After you review your tax returns, are satisfied as to their completeness and accuracy, and sign an authorizing form, we will electronically file the Federal and AL tax returns.

Note: Appointments before 10 am must use the sidewalk to access the rear of the building. Follow the signs to the Annex door.