

Tax Counseling for the Elderly



What to Bring for Alliance on Aging's Free Tax Preparation:

- Completed IRS Intake form 13614-C & Virtual VITA/TCE Taxpayer Consent form 14446
- Proof of identification (photo ID)
- Social Security cards for you, your spouse and dependents
- An Individual Taxpayer Identification Number (ITIN) assignment letter may be substituted for you, your spouse and your dependents if you do not have a Social Security number
- Proof of foreign status, if applying for an ITIN
- Birth dates for you, your spouse and dependents on the tax return
- Wage and earning statements (Form W-2, W-2G, 1099-R, 1099-Misc) from all employers
- Interest and dividend statements from banks & brokerages (Forms 1099)
- Health Insurance Exemption Certificate, if received
- A copy of last year's federal and state returns, if available
- Proof of bank account routing and account numbers for direct deposit, such as a blank check
- To file taxes electronically on a married-filing-joint tax return, both spouses must be present to sign the required forms
- Total paid for daycare provider and the daycare provider's tax identifying number, such as their Social Security number or business Employer Identification Number
- Forms 1095-A, Band C, Health Coverage Statements
- CA Form-3895
- Copies of income transcripts from IRS and state, if applicable
- Summary of expenses if they are over:
 - Single person - \$4,601 Joint filing- \$9,202
- Identified by categories as shown in Part IV of the IRS Intake form 13614-C
- Do you rent your home? (please circle) YES NO
- Do you make Charitable cash donations? (please circle) YES NO
How much _____
- Do you receive a Stimulus Check? (please circle) YES NO
How much _____
- Did you have health care coverage for the year? (please circle) YES NO

Please consider donating to the **Alliance on Aging**. Your donation will go directly to providing critically needed services and programs to seniors throughout the county at **no cost**.