

FREE COMMUNITY TAX SERVICE

APPOINTMENT CHECKLIST

You must bring the following to receive free tax help:

- ☐ Valid picture identification for taxpayer and spouse.
- ☐ Social Security cards and birth dates for yourself, spouse, and dependents.
- ☐ All W-2s, W-2Gs, 1099s, and Social Security/Unemployment benefit statements related to income received during 2022.
- ☐ If filing jointly, both spouses must be present to sign the required forms.
- ☐ Forms 1095-A, B, or C (Affordable Health Care Statements).

Additional information that may be required:

- ☐ If claiming child and dependent care expenses: the name, address, and social security number or EIN (employer identification number) of the provider.
- ☐ If claiming the Indiana Renter's Deduction: the name, address, and phone number of the landlord.
- ☐ If a homeowner: a copy of your county real estate tax statement.
- ☐ Any tax forms received.
- ☐ Copies of last year's federal/state tax returns.
- ☐ For direct deposit of your refund, you must provide bank account and routing numbers.
- ☐ All 1098s related to interest on student loans, including 1098-T.
- ☐ Out-of-pocket educational expenses for college.
- ☐ Any donations to Indiana colleges.

FAST & FREE TAX PREP

Get 100% of your refund!

MonroeUnitedWay.org/FreeTaxes

