2019 Income Tax Preparation Checklist
Getting Help to Prepare Your Taxes
What to Bring With You
Income Guideline $65,000

If you need help completing tax forms, a United Way of Central Jersey volunteer can help you.

Bring these items with you:

- Photo ID any valid Government/State/City/School ID
- Completed Intake Form 13614-C
- Copy of 2018 tax return
- Social Security card or (ITIN) for you, your spouse and any dependents. Tax returns will not be prepared without the Social Security # or ITIN letter.
- Health Insurance proof: Covered through the Marketplace, bring Form 1095-A. Penalty on NJ State if no health insurance in 2019 (new).
- Income documentation including:
  - Wage and Income statement(s) Forms W-2, W-2G, 1099 MISC, 1099R
  - Cash Income with documentation (Nature of business, related expenses)
  - Interest and dividends Income statements
  - Social Security Benefits statement

- Direct Deposit information for Savings & Checking A/C: Routing & account numbers. Fastest & safest way to receive your refund. Incentives offered for splitting your refund into both checking & savings. Savings Account required!

- If any of the following apply, please bring documentation with you:
  - Child/Day Care expenses, including provider’s Name, Address and EIN #
  - Mortgage bank/company statements
  - Business expenses for any 1099-MISC/CASH received (25,000 max. expenses deducted)
  - Alimony paid or received
  - Any IRS or State tax notices received
  - Property tax paid (statement)
  - Rent paid in 2019 - Name must be on lease to claim property tax credit on NJ state return
  - Unreimbursed out of pocket medical expenses – (premiums paid, doctors & dentists, prescriptions, co-pays – add separately, medical miles)
  - Charitable donations (cash & checks) – Tally Non-Cash donations separately)
  - 1098-T from college & a printout of student’s college account. Student loan interest statement for interest paid on loans (1098-E)
  - Additional forms of income such as:
    - Prizes & awards
    - Scholarships and fellowships
    - Lottery/gambling winnings
    - Unemployment Income - please print online or get a copy from the unemployment office
    - State Income tax refunds

Lost documents? Please call the appropriate issuing agencies for duplicate copies.
LIMITED SCOPE OF VITA PROGRAM:
1. Prepares **only** Individual tax returns – No partnership or corporate returns prepared.

2. **Have a small business, self employed or Uber/Lyft driver:** -$25,000 is the maximum business expense deduction allowed with business income. A **business loss cannot be taken without business income**. Taxpayers with a business loss, $0 business income, or expenses in excess of $25,000 must seek a **Paid Preparer to maximize any refunds or limit tax liability**.

3. **Other Limitations:**
   - Must not have had **a net loss from the business**
   - Had only 1 business with no employees
   - **Business use of home deduction disallowed** – even if part of the home was used in the business.
   - Depreciation and amortization deduction will not be taken
   - **Only mileage expenses allowed, actual expenses out of scope**
   - Had no inventory at any time during the year.
   - Cash and not the accrual method of accounting

4. **Rental Income:** **Out of Scope for VITA Program, seek a Paid Preparer**
5. **Non-Cash Charitable deduction, $500** maximum allowed when using the VITA Program

Married Filing Joint returns:
*The signatures of both spouses are required on form (8879).*

**Married Filing Separate returns:**
The SSN and date of birth of spouse is required on the tax return to allow e-file, otherwise client mails.

**Income Guideline - $65,000 for all filing status whether single, married, married filing separate or head of household**

The VITA Program requires all returns, without exceptions to be electronically filed unless there is a valid reason to be determined by the VITA Preparer.

**Appointments needed at all locations:** Please call the site closest to you to schedule your tax appointment.

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