

What to Bring to Have Your Taxes Done

*A Tax-Time Organizer for taxpayers at
CASH Oregon and AARP Tax-Aide Free Tax Sites*

Find the tax site nearest you

- ▶ Call 211info at 2-1-1 or 1-866-698-6158
- ▶ Go to www.cashoregon.org

Everyone should bring:

- ✓ Photo ID.
- ✓ Social Security Cards or ITIN Letters and birth date information for every person on the return (such as parents, children, and other dependents).
- ✓ Copy of last year's tax return.
- ✓ If you are due a refund, bring Bank Account and Routing Numbers for Direct Deposit or a secure mailing address to receive refund check.

Bring All That Apply

Everyone's tax situation is different. This list covers many of the most common forms that people need to bring into our tax sites, but it may not cover everything for your situation. When in doubt, bring more information rather than less!

Most Common Documents

- ✓ Form W-2 from all of your jobs
- ✓ Form 1099-INT from your bank
- ✓ Form 1099-G from unemployment
- ✓ Form 1099-R from pension, IRA or 401(k)
- ✓ If you paid for child care so that you could work, look for work, or attend school, bring...
 - Amount you paid per child and
 - Name, address, and Employer Identification Number or Social Security/ITIN number for each child care provider. Ask for a letter from your childcare provider.
- ✓ Form 1099-Misc from Independent Contracting or Small Business and written records of other income and expenses.
 - Look over "Independent Contractor's Organizer" Sheet and fill it out if necessary.
- ✓ Information on personal contributions to a 401(k), IRA, or other retirement account

See Back for other Common Documents!



AARP Tax-Aide is the nation's largest, free, volunteer-run tax preparation and assistance service. CASH (Creating Assets, Savings and Hope) Oregon is a community based non-profit organization created to help working families improve their financial future.



Other Common Documents

- ✓ 1099-B from broker if you sold stocks or bonds
 - For each stock or bond you sold, you also need to know the purchase date and price. This information may not be on the 1099-B. Call the broker for help if necessary.
- ✓ Form 1098-C and/or 1098-A from Cancelled Debt or Foreclosures
- ✓ Documentation contributions or withdrawals from a Health Savings Account.
- ✓ Form W2-G from gambling winnings
- ✓ Information on IDA deposits
- ✓ Bring the following information if these amounts add up to at least \$2000
 - Form 1098 from showing how much mortgage interest you paid
 - Property Tax Statement showing how much property tax you paid (this information may also be on your Form 1098.)
 - Receipts and totaled list of charitable donations made in 2011.
 - If you are over 62 or your medical expenses were more than 7.5% of your income, bring receipts and totaled list of medical expenses paid in 2011.
- ✓ For Students or Parents of Students:
 - Form 1099-T for tuition you paid for you or your dependent to attend college
 - Receipts or list of required expenses you paid for books etc.
 - Form 1098-E showing student loan interest paid in 2011
 - Information on deposits and/or withdrawals from an Oregon 529 Plan or other special Education Savings accounts.

Taxpayer Tips

- ▶ Our IRS Certified Volunteers are trained and tested annually on the most common areas of tax law that affect low and moderate income families. They are not trained on every possible tax situation. If you have any of the following, our volunteers will not be able to prepare your taxes:
 - Small Business with a net loss and/or more than \$10,000 in expenses
 - Income from a partnership or trust reported on Schedule K-1
 - Complicated stock and bond sales
 - Rental Income with any expenses
 - Other complex issues.
- ▶ If you need an ITIN for yourself or a member of your family, please contact one of the following sites for more information:
 - El Programa Hispano: (503) 489-6845
 - Lloyd Center: (503) 243-7765
 - Bienestar: 503- 359-7963
- ▶ If you are age 58 or over and want to apply for Oregon Elderly Rental Assistance, bring
 - the amount you paid in 2011 for lights, water, garbage, sewer and heat
 - Value of your assets such as cash, bank accounts, and personal property



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