

NYC FREE TAX PREP

Trusted,
Professional
Filing

WHAT YOU NEED TO FILE



Identification:

- Government-issued photo ID (includes IDNYC)
- Social Security or Individual Taxpayer Identification Numbers (ITIN) and birth dates for you, your spouse, and your dependents



Proof of Income:

- Forms W-2, 1098, 1099, or income and expense records if you are self-employed

Forms may include:

- Form W-2 (wages from each job)
- Form 1099-INT (interest)
- Form 1099-DIV (dividends)
- Form 1099-R (retirement plans)
- Form W-2G (gambling winnings)
- Form 1099-G (unemployment)
- Form SSA-1099 (Social Security benefits)
- Form 1099-MISC (miscellaneous income)
- Form 1099-K (deposits and earnings)
- Form 1099-B (sale of stock)
- Form 1098-T (scholarships and grants)
- Form 1099-C (cancellation of debt)
- Form 1098-T (tuition payments to attend a university or technical college)
- Form 1098-E (interest paid on student loans)

Other income documentation if you are self-employed may include:

- Log books showing income received and clients served

Raw estimates are not acceptable.

- Copies of bank statements



Other:

- Documentation of business expenses if you are self-employed, including:
 - Paid invoices
 - Remitted checks
 - Credit card charges
 - Information about any home office

Raw estimates are not acceptable.

- Filed Forms 1040-ES (federal) and IT-2105 (New York State) showing estimated tax payments for 2018 if you are self-employed
- Copy of 2017 federal and State tax returns (if available)

To file online: You must have your 2017 Adjusted Gross Income (AGI) or Self-Select PIN Number.

If you cannot find this information on the return or do not have your 2017 tax return, call the Internal Revenue Service (IRS) at 1-800-908-9946 or visit irs.gov and search "Get Transcript" to request a Tax Return Transcript.

- Proof of health insurance coverage (Forms 1095-A, 1095-B, or 1095-C) or Health Insurance Exemption Certificate (if applicable) for you, your spouse, and your dependents
- Payment records for child care, including the provider's name, address, and Employer Identification Number, Taxpayer Identification Number, or Social Security number
- Records of cash and non-cash charitable contributions



Banking Information:

- Bank account and routing numbers for direct deposit of your refund

Need to open a bank account?

Visit nyc.gov/safestart to find out how you can open an NYC SafeStart Account. The NYC SafeStart Account has no overdraft fees and no monthly fees if you maintain a minimum balance of \$25 or even less depending on the financial institution.

- NY 529 account, routing, and plan numbers to directly deposit all or part of your state refund into a college savings account

Did you know you now can split your NYS refund and directly deposit all or part of it into a 529 College Savings account? There's no minimum balance needed to open an account. Visit nysaves.org or call 1-877-NYSAVES (1-877-697-2837) to learn more and to create an account.

If you are filing a joint return, both spouses must be present.