

# Free Tax-Preparation Service

from Hudson Valley CASH Coalition ([hv-cash.org/client](http://hv-cash.org/client))

**Find a Site:** Call 211 or 800-899-1479 (daily, 8 a.m. to 8 p.m. ET) to find a site where tax preparation service is being conducted. Many sites require reservations.

**Note your reservation here:**

Time: \_\_\_\_\_ Date: \_\_\_\_\_

Address: \_\_\_\_\_

Telephone number of site contact: \_\_\_\_\_

**Checklist of documents to bring. You may not need all these documents.**

- |   |   |
|---|---|
| <input type="checkbox"/> Social Security Card(s)  | <input type="checkbox"/> Medical Expenses – including Eye and Dental Care       |
| <input type="checkbox"/> Driver's License(s)  | <input type="checkbox"/> Cash and Non-Cash Charitable Donations                 |
| <input type="checkbox"/> Dependent's Social Security Numbers & Dates of Birth                         | <input type="checkbox"/> Record of Sale or Purchase of Residence                |
| <input type="checkbox"/> Last Year's Federal & State Tax Returns                                      | <input type="checkbox"/> Mortgage or Home Equity Loan Interest Paid – Form 1098 |
| <input type="checkbox"/> Wage Statements – Form W-2   | <input type="checkbox"/> Real Estate and Personal Property Taxes Paid           |
| <input type="checkbox"/> Pension or Retirement Income – Form 1099-R                                   | <input type="checkbox"/> State or Local Taxes Paid                              |
| <input type="checkbox"/> Interest and Dividend Income – Form 1099-INT and Form 1099-DIV               | <input type="checkbox"/> Unreimbursed Employment-Related Expenses               |
| <input type="checkbox"/> State Income Tax Refund Amount – Form 1099-G                                 | <input type="checkbox"/> Job-Related Educational Expenses                       |
| <input type="checkbox"/> Social Security Income – SSA-1099  | <input type="checkbox"/> Educator Expense                                       |
| <input type="checkbox"/> Unemployment Income – Form 1099-G  | <input type="checkbox"/> Tuition and Education Fees – Form 1098-T               |
| <input type="checkbox"/> Commissions Received or Paid   | <input type="checkbox"/> Student Loan Interest – Form 1098-E                    |
| <input type="checkbox"/> Information on sales of Stocks or Bonds – Form 1099-B                        | <input type="checkbox"/> Casualty or Theft Losses                               |
| <input type="checkbox"/> Self-Employment Business – Form 1099-MISC                                    | <input type="checkbox"/> Estimated Taxes  |
| <input type="checkbox"/> Farm Income & Expenses – Form 1099-MISC                                      | <input type="checkbox"/> Foreign taxes Paid                                     |
| <input type="checkbox"/> Lottery or Gambling Winnings – Form W-2G                                     |   |
| <input type="checkbox"/> Lottery or Gambling Losses   |   |
| <input type="checkbox"/> Income and Expenses from Rentals   |   |
| <input type="checkbox"/> Income from Partnerships, S Corporations, Trusts, and Estates – Schedule K-1 |   |
| <input type="checkbox"/> IRA Contributions  |   |
| <input type="checkbox"/> Alimony Paid or Received   |   |
| <input type="checkbox"/> Childcare Expenses & Provider Information                                    |   |

Learn more about tax preparation events sponsored by Hudson Valley CASH Coalition at <http://hv-cash.org/client>