

Section A

Tax Prep Guidelines

INCOME - Must report all income earned	Form / Forma
Wages	W-2
Unemployment income	1099-G
Retirement income	1099-R
Social Security benefits	SSA-1099
Interest Income	1099-Int.
Dividends Income	1099-DIV
Cash (or) Business income	1099-MISC, 1099-K
Partnership Income	K-1
Gambling Income	W-2G
Payments from Coverdell	ESA
State Refunds Form	1099-G
Distributions from Archer MSA or and HSA	1099-SA
Payments from Long Term Care Form	8853
Cancellation of debt (Credit Cards, Forclosure, etc.)	1099-C
Other Income (Ask us)	Ask us

Section B

Health Insurance for 2019 isn't Mandatory	1095-A, 1095-B, or 1095-C
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Section C

DEPENDENTS - children/ minors under your custody.	
<p>Proof requirements:</p> <ol style="list-style-type: none"> 1. Birth Certificates or Court order releasing the right to claim child on your tax return 2. Proof of your dependent living with you for more than 6 months during the year: <ul style="list-style-type: none"> • School Letter, (no report card), or "unofficial transcripts" • School-generated : Student profile, or • Medical Records (no immunization), or • Landlord verification (we'll help w/ form) <p>Proof should include the following:</p> <ol style="list-style-type: none"> a) <u>Name of child, (your dependent)</u> b) <u>Parent / custodian's name</u> c) <u>Address,</u> d) <u>Enrollment and attendance dates including the tax year we're processing</u> 	<p>Minor dependents include:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Children <input type="checkbox"/> Stepchild <input type="checkbox"/> Grandchild <input type="checkbox"/> Adopted <input type="checkbox"/> Siblings <input type="checkbox"/> Siblings' children (niece, nephew, etc.) <p>(**If you are head of household you may bring proof of financial support, see section t E**)</p>

Section D

DEPENDENTS WITH DISABILITY Bring recent Medical records that include diagnosis and date of the disability condition. Records must include the above <u>information a), b) and c).</u>	
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Section E

<p>OTHER DEPENDENTS Bring financial support proof</p> <ul style="list-style-type: none"> • Utility bills • Lease Agreement • Proof of financial support 	<p>** Head of Household & taxpayers claiming Other Dependents</p>
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Attention:

You must renew ITIN with the following #'s:

70, 71, 72, 73, 74, 75, 76, 77, 78, 79, 80, 81, 82, 83, 84, 85, 86, & 87

- The renewal should be processed before April 15. If it is not, you will not receive credit for children.
- The renewal can take up to 2 months to process, so it is recommended to be proactive on this matter!

2019 Standard deduction increased as follows

If You File:	2018-today	EITC - Credit for children dependents living w/you, & related to you. Credit may vary based on annual income. See proof Sec.C-previous page) <ul style="list-style-type: none">• \$6,557 with three or more qualifying children• \$5,828 with two qualifying children• \$3,526 with one qualifying child• \$529 with no qualifying children
Married filing jointly and widow(er)	24,400.00	
Head of Household	18,350.00	
Single	12,200.00	
Married filing separate	12,200.00	
Child Tax Credit (minors under 17 yrs)	2,000.00	
Non-refundable credit for other dependents-	500.00	