

# IT'S TAX TIME



intuit FINANCIAL FREEDOM FOUNDATION

## TAXPAYER APPOINTMENT REQUIRED DOCUMENTS

**REMINDER:** Intuit's Free File offering, *IRS Free File Program Delivered By Turbo Tax* Eligibility Requirements are: 2020 Adjusted Gross Income of \$39,000 or less **OR** you are EITC eligible

- Copy of your 2019 taxes, if available, as you will need your Adjusted Gross Income (AGI) amount that appears on your 1040 page 1, line 8b, to complete your return
- Your social security number (SSN) or ITIN for each family member you are claiming as a dependent
- Proof of income, including W -2 and 1099s (1099-NEC, 1099-K, 1099-INT, 1099-DIV, 1099-SSA, 1099-R)
- Form 1095 - A for healthcare insurance received from healthcare.gov or the marketplace
- Records of deductible business expenses (if you own your own business), that are both ordinary and necessary
- Notice 1444 - IRS Economic Impact Payment (EIP) or you must know the exact EIP amount(s) received for BOTH Stimulus payments
- Your bank checking and/or savings account numbers and bank routing number for direct deposit (for a faster refund)
- Child Care provider information (full name, phone number, Employer Identification Number (EIN) or SSN, & address)



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