



# TAX PREP CHECKLIST



1

## Have Your Personal Information Ready

**Do you have a government ID (state ID, military ID, driver's license, or passport)?**

Yes – Your name, address, and ID number will be used to file your taxes.

No – You can get help from your states' driver facility. Current and former foster youth should contact their case manager or dependency attorney.

**Do you have a permanent address?**

Yes – This will be used if the IRS needs to send you a letter.

No – You can still file your taxes. If you are homeless, ask the shelter or clinic you are staying at if you can use their address as your permanent address.

**Do you have a Social Security number or Individual Taxpayer Identification Number?**

*If you have a spouse, children, or are caring for an elderly parent in your home you'll need their Social Security numbers too.*

Yes – You will need this number when you file your taxes and enter it accurately.

No – If you have a Social Security number, but do not know it, visit your local Social Security office with a valid form of identification or their website at [www.ssa.gov](http://www.ssa.gov). Current and former foster youth or homeless should contact their case manager or dependency attorney.

If you do not have a Social Security number and are not eligible for one, you may use an ITIN to file your taxes. To obtain an ITIN number, make an appointment to apply in-person at an IRS Taxpayer Assistance Center, apply by mail, or contact an IRS-authorized Certifying Acceptance Agent. Some **VITA sites** are Certifying Acceptance Agents. You can complete this **quiz** to see if you should file an application for ITIN.

**Do you have a bank account?**

Yes – Have your checking or savings account number and bank routing number when you file your taxes to receive your refund by direct deposit.

No – Search online for a prepaid debit card and have your refund direct deposited.

**Did you file taxes last year?**

Yes – Find your copy of last year's federal tax return. You will need your adjusted gross income to file your own return.

No – It's not too late to file. Gather the same information and documents and your preparer can help you file.

## Gather Work, Scholarships, Income, and Earnings Documents

### Did you work as an employee in a part-time or full-time job?

Yes – Did you receive (by mail or electronically) a W-2 from each employer you worked for in the year?

*A W-2 is a form with the income and amount of taxes your employer withheld from your paycheck. Your employer must issue your W-2 by January 31. If you moved during the year, make sure to call or email your employer to update your address with them.*

If you have lost or did not receive it – Contact your employer to see if they will resend it. You can ask for the form electronically for immediate delivery.

### Did you work as a contractor, freelancer, or self-employed?

Yes – Did you receive by mail or email a 1099-NEC, 1099-K or 1099-MISC form from each company or individual you contracted with? By January 31, you should receive 1099 forms from whoever is paying you for the work, but they are only legally required to issue a 1099 if they paid you \$600 or more in the year.

If you have earned more than \$600 as a contractor and have not been sent a 1099, you can file taxes without one by reporting your own income.

### Did you receive unemployment compensation?

Yes – You will receive a 1099-G and this information will be needed to file your taxes.

## See If You Qualify For Tax Credits

### Did you earn at least \$1 in the tax year? Tax credits put money back in your pocket.

Federal Earned Income Tax Credit - For the 2021 tax year, the earned income credit ranges from \$1,502 to \$6,728 depending on whether or not you are filing a joint return and how many children you have. Check **here** to see how much you could qualify for in tax credits.

### Are you a parent?

Child Tax Credit and Advance Child Tax Credit – Child Tax Credit for 2021 taxes is worth up to \$3,600 for a child age 5 and under and up to \$3,000 for a child age 6 through 17 at the end of 2021. Click **here** for more information.

### Did you pay for childcare in the tax year?

Childcare credit – Keep your receipts from childcare, day care, summer day camps, or babysitters. For 2021, you can claim up to \$8,000 of your expenses paid for one child and \$16,000 for more than one child. Generally, children must be under age 13 during the tax year and live with you for more than half of the year. You may also claim care expenses for a person who wasn't physically or mentally capable of self-care who lives with you for more than half of the year, if this person is your spouse or your dependent, or someone you could claim as a dependent. You will need the name, address, and employer identification (EIN) or social security number (SSN) of the provider when you file for this credit.

*To see if your expenses qualify, visit the Publication 503, the instructions for the Form 2441, or click **here**.*

## Federal Stimulus and Advance Child Tax Credit Payments

### Did you receive your third federal stimulus check?

2021 Third Stimulus Payment – In 2021, U.S. citizens and U.S. resident aliens who had a Social Security number, or had a dependent with a Social Security number, have a filing status of Single, Head of Household, Widow or Married Filing Separate, and earned up to \$75,000 of income (earned up to \$150,000 of income for Married Filing Joint filing status) qualify for a \$1,400 payment and an additional \$1,400 per dependent. All stimulus payments have been issued. If you qualify and did not receive the third stimulus payment, you will need to claim it as a credit on your 2021 income tax return.

*If you received the third stimulus payment in 2021, watch for Letter 6475 being mailed in January 2022.*

### Did you receive Advance Child Tax Credit payment?

In July 2021, the IRS began issuing monthly Advance Child Tax Credit payments to those who qualified.

*If you received Advance Child Tax Credit payments, watch for Letter 6419 being mailed in January 2022.*

## Schedule a Free Tax Appointment or File Yourself For Free!

### Do you want free help filing your taxes from an IRS certified and trained tax volunteer?

If Yes – and you made \$58,000 or less in the tax year (or are 60 years of age and older with any income), you can file your federal and state taxes for free in person or virtually at a Volunteer Income Tax Assistance (VITA) or Tax Counseling for the Elderly (TCE) program site.

VITA offices open throughout the country each year on February 1st. Some are open all year. To find a VITA or TCE office near you, call 1-800-906-9887 or use the **Locator Tool**. Call or go to their website to set up an appointment time. Appointments may be virtual, drop-off, or in-person following safety guidelines.

### Do you want to file your taxes for free yourself?

If Yes – and you made \$73,000 or less in the tax year, you can file your federal for free online. Visit **here** to prepare and file your federal income tax online.



Scan the QR code to learn more about tax preparation or visit [www.taxpayeradvocate.irs.gov](http://www.taxpayeradvocate.irs.gov).