

## What to Bring With You to your Tax Appointment:

Please review the following list carefully before visiting a DABC free tax Preparation Site to ensure that you have all the required documents needed to complete your Federal and State of Colorado tax return:

### Personal Information You Need

- **A copy of your 2019 and 2020 Federal Tax Return.** (May be required to determine Earned Income Credit Eligibility and Child Tax Credit).
- Social Security Cards for yourself, your spouse, and any dependents, if applicable.
- Individual Taxpayer Identification Number (ITIN), if applicable.
- Government issued photo identification card such as a driver's license.
- Identity Protection PIN (IP PIN), if the IRS has mailed one to you for identity theft.
- **The total amount received from Stimulus Payments in 2021,** or a copy of **IRS Notice 1444-C.** (*If you did not receive the full Stimulus amounts, you may be eligible for a Recovery Rebate Credit.*)
- Bank account and routing number for direct deposit (refund) or direct debit (payment).
- If you received Advance Child Tax Credit payments, bring the total amount of **Advance Child Tax Credit payments received during 2021** or a copy of your IRS letter 6419. (IRS letter 6419 will be sent out by the IRS in early January 2022.)

### Income

- All 2021 W-2 (Wage and Tax Statement) forms from all your employers.
- Your spouse's 2021 W-2 forms, if filing jointly.
- All Forms 1099 for you and your spouse (if filing jointly). The most common are:
  - 1099-MISC, miscellaneous income paid to you
  - 1099-NEC, nonemployee compensation
  - 1099-INT, showing interest paid to you
  - 1099-G, unemployment paid to you or any refund, credit or offset of state and local taxes paid to you
  - 1099-DIV and 1099-R, showing dividends and distributions from retirement and other plans paid to you
  - 1099-C, cancellation of debt
- Forms 1095-A (Health Insurance Marketplace Statement) if you have health insurance through the Marketplace.
- If self-employed, in addition to your 1099-NEC income document(s), download and bring a completed [Self-Employment Tax Organizer](#) to show your expenses and business miles.

### Expenses and Other Forms

- Any Form 1098-T educational expenses paid to a qualified educational institution (including tuition/mandatory fees and interest paid on student loans).
- If you may be able to Itemize your deductions, bring receipts of your expenses for out-of-pocket medical and dental, property taxes, auto vehicle registration, home mortgage interest, charitable contributions, casualty losses, and other job expenses.
- If you pay a child care provider, the address and Tax ID numbers of the provider(s) (Social Security or Federal ID numbers).
- If you are Amending your tax return, a copy of the **original return** submitted and any of the above documents that you are correcting.

## **If you are missing a Form W-2 or 1099**

Your employer or the issuing financial institution should be able to provide you with a copy of your missing W-2 or 1099.

If you cannot get a copy from your employer or financial institution, please **contact the IRS** for assistance. Go to <https://www.irs.gov/individuals/get-transcript>. IRS transcripts do not show state withholding, so contact the Colorado Department of Revenue at (303) 238-7378 to request state W-2s so that we can also file your state taxes.

## **Get a faster refund with direct deposit**

If electronically filing, direct deposit refunds take 10-14 business days, versus 45 days for a paper check. Some DABC Sites can **open a bank account for free** if you do not already have one. There may be a small fee for initial check order.