

FREE TAX PREPARATION - WHAT TO BRING

We must have all required tax forms and documentation to complete your return. If we determine that you are missing any documents, we will give you back all your paperwork and ask you to reschedule your appointment for another day. We **DO NOT** retain any paperwork.

Identification

- **Photo ID's for you and your spouse, if filing jointly**
- **Original documents showing proof of social security number or ITIN for everyone on the return.**
No photocopies or scans accepted. This can be one of:
 - Social Security Card, **OR**
 - Official mail from the Social Security Administration showing your social security number, **OR**
 - ITIN letter

Income Documents

- **W2 forms from all jobs in 2025**
- **Work overtime?** Bring your last pay stub of the year
- **Copies of all applicable 1099 forms:**
 - 1099-G (unemployment)
 - 1099-R (retirement payments)
 - 1099-INT (interest statements)
 - 1099-SSA (Social Security)
 - 1099-NEC (self-employment)
 - 1099- MISC (miscellaneous income)

Other Items

- **Routing and account number or a blank check for direct deposit.**
- **Self-employed and gig economy:** a list of deductible expenses by category. For Uber/Lyft and similar app-based self-employment, any tax time documents they prepare for you which include mileage and other deductible expenses
- **Health insurance forms:**
 - 1099-HC required unless you were on MassHealth or Medicare/Medicaid
 - 1095-A required if you had Health Connector insurance, in addition to the 1099-HC
- **Daycare/childcare expenses:** a letter from your childcare provider with their name, address, and Employer Identification Number (EIN) or Social Security Number (SSN)
- **Post-secondary education (college in any form: associates, bachelors, or graduate education):** Form 1098-T and a list of expenses
- **Student loan payments:** Form 1098-E
- **The amount of all rent paid in 2025**
- **Total amount of public transit, bike or EZ Pass expenses paid in 2025, including:**
 - All MBTA or other regional public transit fares - weekly/monthly passes or individual fares
 - Costs to buy, maintain, repair or store a bicycle (including electric bicycles)
 - Bike-share membership fees
- **Seniors: if you or your spouse are 65 or older and you own a home:**
 - Total amount of real estate taxes paid in 2025
 - Total amount of water and sewer charges paid in 2025
- **Any mail that you have received from the IRS or MA DOR regarding prior year returns**