

# Welcome!



Please answer these questions  
**BEFORE** completing your paperwork.

Was your household income over **\$55,000** last year? Y / N

*This is our income limit for families of 4 or fewer. We increase the limit by \$5,000 for each additional family member beyond 4 people.*

Are you here without your spouse (and filing a joint return)? Y / N

*Both spouses must be present for all stages of the process when filing a joint return.*

Did you forget any of your tax documents? Y / N

*This includes your photo identification and social security cards or ITIN letters for everyone on the return. See the reverse side for a checklist of other tax documents you may need.*

If you ran your own business, received a Form 1099-MISC,  
or received cash/checks for work you did, did you...

Pay employees to work for you? Y / N

Pay a helper? Y / N

Have an office in your home? Y / N

Have business expenses greater than \$25,000? Y / N

Keep an inventory? Y / N

Are you present in the U.S. on an F, J, M or Q visa? Y / N

Did you arrive to the United States in 2019? Y / N



If you answered "YES" to any of the questions above,  
please return to the front desk for assistance!

## What Should I Bring to the Tax Center?

*Use this checklist to save time by getting organized before you come in!*

www.ProspertaxHelp.org

You	Spouse	Dependents	<b>Basic Info</b>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Social Security Cards or ITIN Letters for everyone on the tax return
<input type="checkbox"/>	<input type="checkbox"/>		Your valid photo ID
<input type="checkbox"/>			Bank information (routing and account numbers for direct deposit)
<input type="checkbox"/>			Last year's tax return (if you have it)
You	Spouse	Dependents	<b>Documents Received</b>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Form W-2s – Wage and Tax Statement
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Form 1099s – Interest Income (1099-INT), Unemployment Compensation (1099-G), Miscellaneous Income (1099-MISC), Dividend Income (1099-DIV), Retirement Plan Distribution (1099-R) & Cancellation of Debt (Form 1099-C)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Form 1095-A – Health Insurance Marketplace Statement
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Form 1095-B – Health coverage form from insurance company
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Form 1095-C – Health coverage form from large employer
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Health Insurance Marketplace exemption certificate
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Form 1098-T – Tuition Statement - along with student account summary
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Form 1098-E – Student Loan Interest Statement
<input type="checkbox"/>	<input type="checkbox"/>		Form 1099-SSA – Social Security Benefit Statement
<input type="checkbox"/>	<input type="checkbox"/>		<b>FOR HOMEOWNERS:</b> Form 1098 – Mortgage Interest Statement
<input type="checkbox"/>	<input type="checkbox"/>		<b>FOR HOMEOWNERS :</b> Receipt showing real estate taxes paid
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Form W-2G – Certain Gambling Winnings
You	Spouse	Dependent	<b>Personal Records</b>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Child and dependent care expenses
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Education expenses – detailed student account summary
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Medical expenses
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Charitable contributions
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Retirement contributions
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<b>FOR HOMEOWNERS:</b> Receipts for energy saving improvements on your home
You	Spouse	Dependent	<b>If You Are Self-Employed</b>
<input type="checkbox"/>	<input type="checkbox"/>		Record of business expenses, business income, and Forms 1099-MISC