* If we need to call you, you will see the following phone number. PLEASE be ready to answer on Monday or Tuesday: **(636)299-0050. You may use this number to call us, as well. If no answer, please leave voice mail with YOUR name and number. You may also call the Senior Center at (618)664-1465 and leave a message for the volunteers.**

Items to bring for Tax Preparation (Please have all forms removed from envelopes, and arranged in the order indicated below.)

* Taxpayer and spouse SS cards (copies ok)
* Dependent(s) SS cards (copies ok)
* Photo ID / Driver License for Taxpayer and spouse
  + Place these items on table for quick review by Volunteer.

In ENVELOPE or folder: **Prior years’ tax returns (2019 and 2020), plus . . .**

* Intake Booklet -- complete all pages **prior to** appointment date and time.
  + Pages 1 and 2 –Include EMAIL address and good phone #
  + Pages 3 and 4 -- custom questions / demographic Info -- **completed**
  + Pages 6 – 8 -- consent forms- **SIGNED**
  + List any additional notes or questions in NOTES
* ALL Income: Indicate how many of each document
  + W2’s\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
  + 1099-R \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
  + RRB 1099-R\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
  + SSA 1099-R Social Security \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
  + 1099 MISC or NEC forms\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
  + 1099 Interest and Dividends\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
  + Other income items
    - Jury duty pay, gambling winnings, 1099-C\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
    - Unemployment Compensation Form 1099-G box 1\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
    - Capital gains / loss – brokerage statements (1099B)\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
    - Form 1099-K\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
  + Business Income and Expense documentation (1099-MISC/NEC) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
  + INFO for Child Care Credit (statement from Caregiver with name, address, EIN, amount paid for each child) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
  + Education Credits worksheet -- all Forms 1098-T\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
    - Student Account Statement\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
  + INFO on all Federal and State estimated tax payments\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
  + Health Insurance information 1095-A, B, C\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
  + Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
  + DID YOU Receive a 3rd Recovery Rebate payment? \_\_\_\_\_\_ How much? \_\_\_\_\_\_\_\_\_\_\_\_\_\_
  + **Provide a VOIDED check if you want DIRECT DEPOSIT (not deposit slip)**

# AARP Tax-Aide *QUESTIONS FOR ALL ILLINOIS TAXPAYERS*

Any Federal Tax Exempt interest and dividend income? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

# Contributions made to the following college savings plans?

Bright Star, College Illinois or Bright Directions college savings plans: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Any U S Treasury Bonds, bills, notes, or savings bond interest? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Any Dividend Income from stocks of Abbott Laboratories (ABT), Abbvie (ABBV), Caterpillar Tractor (CAT) or Walgreens (WAG)? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Any distributions from Bright Star, College Illinois or Bright Directions college savings plans if included in Line 1 of Illinois 1040 because taxpayer claimed a Federal American Opportunity or Life Time Learning Credit? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Illinois Property Taxes paid in 2021 **on your principal residence**: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Illinois County in which your principal residence is located: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

County Property Number of your principal residence: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Instructional Materials and Supplies Credit? (1299-I) ­­­­­­­­­­­­­­­­­­­­­­­­\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

K-12 Education credit (ICR): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

# Estimated Illinois Taxes paid applicable to 2021: ­­­­­­­­­­­­­­­­­­­­­­­­­\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date of each payment: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Amount of each payment: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Amount of Refund (if any) to be applied to 2021 tax liability: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**NOTE: Codes 4D and 7D on 1099-**R -- These codes indicate that the distribution is not considered “retirement” income under Illinois law, and therefore cannot be subtracted from the Federal AGI amount.