

The following Criteria must be met in order for IRS to prepare your Federal Tax Return:

- You, your spouse and any dependents must be U.S. Citizens, Resident Aliens or have a valid Individual Taxpayer Identification Number (ITIN)
- Returns will only be prepared for taxpayers with a total income of \$ \$40,000 or less
- If filing a **Married Filing Joint** return, you **and** your spouse must be present
- If filing a **Married Filing Separately** return **and** you or your spouse live in a **Community Property** state, we **CANNOT** prepare your return
- Social Security Number information presented **must match** the Social Security Number (SSN) on Wage & Income statements (i.e. Form W-2, Form 1098, Form 1099, etc.)
- If your Social Security Number information does not match your Wage & Income statements you will need to contact the issuer to correct those statements (i.e. Form W-2, Form 1098, Form 1099, etc.)
- Verified ITIN taxpayers are exempt from this requirement

You will need to bring the following (if applicable) in order to have your Federal Tax Return prepared:

- Valid picture identification for you and your spouse
- You and your spouse's name, address and phone number
- Copies of ALL Forms W-2, 1098, 1099 and the amount of any other income received by you or your spouse
- One of the following for you, your spouse and any other persons listed on your tax return:
 1. Social Security Number (SSN) Card or Letter*
 2. Adoption Taxpayer Identification Number (ATIN) Card or Letter*
 3. Individual Taxpayer Identification Number (ITIN) Card or Letter*
(You must have been issued an ITIN by IRS to qualify for e-file)

** Official Social Security Administration or IRS ITIN assignment letters are acceptable.*

- Date of birth for you, your spouse and your dependents
- If claiming the Child / Dependent Care Credit, the care provider's address and Tax Identification Number (TIN)
- Form 8332, Release of Claim to Exemption for Child of Divorced or Separated Parents, or copy of divorce decree if you are the non-custodial parent claiming a child as a dependent
- Proof of Account Number and Routing Number of the financial institution for a direct debit or a direct deposit of an anticipated refund into your checking and/or savings account

Additional Information:

- All current year tax returns will be electronically filed

- A 5-digit Personal Identification Number (PIN) will be required for all e-filed returns, if applicable

Form and Schedules that IRS will prepare:

- Form 1040
- Form 1040EZ
- Form 1040A
- Form 1040X (Note: 1040X returns cannot be e-filed)
- Schedules A, B (Interest and Dividends; ordinary and qualified)
- Schedules C-EZ
- Schedule R or Schedule 3
- Earned Income Tax Credit (EITC). ITIN taxpayers are not eligible for EITC
- Schedule SE with Schedule C-EZ only
- Dependent Care (Form 2441)
- Moving Expenses (Form 3903)
- Casualties and Thefts (Form 4684)
- Additional Taxes on Qualified Plans (Form 5329)
- Residential Energy Credit (Form 5695)
- Nondeductible IRAs and Coverdell ESAs (Form 8606)
- Additional Child Tax Credit (Form 8812)
- Exclusion of Interest from Series EE and U.S. Savings Bonds (Form 8815)
- Adoption Credit (Form 8839)
- Archer MSAs and Long-Term Care Insurance Contracts (Form 8853)
- Education Credit (Form 8863)
- Retirement Savings Credit (Form 8880)
- Health Insurance Credit for Eligible Recipients (Form 8885)
- Direct Deposit of Refund (Form 8888)
- Health Savings Accounts (Form 8889)
- Tuition and Fees Deduction (Form 8917)
- Social Security Worksheets