



Food Bank's Tax Assistance & Financial Services Program provides free tax preparation services to low-income New Yorkers, helping them get the refunds and credits to which they are entitled. This includes the **Earned Income Tax Credit (EITC)**—a key piece of the public safety net, which alone **can be worth up to \$8,682** for families.

## TAX PREPARATION DOCUMENT CHECKLIST

- A photo ID for you and your spouse (if filing a joint return). If you have a state ID or driver's license, you **must have it with you** when filing, or your tax return may be delayed.
- Social Security cards\* (originals or copies) or ITIN (originals or copies) for you and anyone you are claiming on your tax return; or a letter from the Social Security Administration.
- If you are claiming childcare expenses, the amount you paid and the childcare agency's ID, or the name and Social Security Number of the childcare provider.
- A sample check or a bank statement with the routing and account number, if you have a savings or checking account for direct deposit.
- Form 1098-T if you paid tuition for post-high school education.
- If you are filing a joint return, both you and your spouse must be present.
- W-2s for all jobs you held in the prior year and all 1099 forms paid in cash or personal checks. You must also know your total income and deductible expenses for the year.
- If you purchased health insurance through the marketplace and were eligible for the premium tax credit, please bring form 1095-A.
- If you are a victim of identity theft, bring your IP-PIN (Individual Protection- Personal Identification Number) assigned by the IRS.
- Any other tax-related information you may have received.

*For more information about Food Bank's Tax Assistance & Financial Services Program, call our tax line at 646-981-6111*