



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 \$8,991 for families.

- Income must be below **\$57,000 for all filing statuses.**
- If you are filing a joint return, both you and your spouse must be present to sign.

TAXPREPARATION DOCUMENT CHECKLIST

- Picture ID** for yourself (and for your spouse, if you are filing jointly).
- Social Security cards or ITIN** (copies or a letter from SSA or IRS letter for ITIN are also accepted as proof) for you and anyone you are claiming on your tax return. Medicare Card, SSA verification documents with a truncated SSN, (i.e., ***-**-1234).
- Copies of all Forms W-2** for all jobs you held in the prior year (last pay stub is not acceptable).
- Form 1099 for other income** (i.e., bank interest, unemployment, self-employment, etc.) **OR 1098E, 1098T (Tuition)**
- Form 1099-R**, if you get a pension, or **Form SSA-1099**, if you get Social Security.
- Amounts of any other income** from your records (Jury Duty fees, cash earnings, etc.).
- Form 1095-A** if you purchase health insurance through the Market Place.
- Forgiveness of Debt (Form 1099-C).**
- Income from the Sale of Stocks, Bonds or other Assets (**Form 1099-B**).
- Self- Employment Income** (reported on Form 1099-MISC or from your own business) and you incurred deductible expenses to earn your income. Expenses of 35,000 and under.
- NOTE:** To determine the **best EITC** you may be eligible for, please bring your complete 2019 Tax Return (**Form 1040, along with EIC Worksheets A & B**)
- NOTE: Economic Impact Payment (EIP) Notices 1444A and 1444B** that state any EIP received. If you do not have the notices, **you must know amounts received.**

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