MORRIS COUNTY TAX AIDE INFORMATION

What to bring with you and do before your visit

GENERAL INFORMATION

If filing a joint return and all required documents are signed by both taxpayers, only one taxpayer needs to attend the first appointment.

If filing a joint return, both taxpayers need to attend the second appointment.

Due to Covid-19, only the taxpayer(s) should attend the appointments.

Please review the Covid-19 Screen sheet before your appointment.

THINGS TO DO PRIOR TO ARRIVING AT THE TAX PREPARATION SITE

1. Print and complete the Tax Year 2020 Intake Form that you downloaded from our website or was picked up by you and bring it with you. Do your best. We'll help you if you get stuck on any of the questions.

2. Read the 3 consent forms included with the Intake Booklet. If you and your spouse, if applicable, agree with the actions to be taken by AARP listed in forms, sign and date each form to which you are giving consent. You do not have to consent to all 3 forms. If filing a joint return, both taxpayers must consent. You are not required to consent to any form in order to have your taxes prepared and e-filed.

3. Print and sign (taxpayer and spouse) form 14446 that was downloaded from our website or picked up by you. This form authorizes us to assist you with preparation of your return using scanning technology and Cloud storage. If this form is not signed, we cannot prepare your tax return.

   Form 14446 for Chatham Sr. Community Center
   Form 14446 for Denville Municipal Building
   Form 14446 for Morristown Senior Center
   Form 14446 for Parsippany Library

4. Print and complete the applicable areas on the Itemized Deductions Worksheet that was downloaded from our website or picked up by you. DO NOT bring in medical or charitable contribution receipts.

5. Print and complete the Education Credits Worksheet (if applicable) that was downloaded from our website or picked up by you

6. **If you have unemployment compensation, you MUST print out the 1099-G document. You can find this document at: https://myunemployment.nj.gov/. You will need to sign into your unemployment account to retrieve the document. We cannot print this document for you. We cannot prepare your return without this form.**

MORRIS COUNTY TAX AIDE INFORMATION

What to bring with you and do before your visit

THINGS TO BRING WITH YOU TO YOUR TAX PREP APPOINTMENT

Remember to bring with you all of the following that apply to your situation.
Items in bold are required in order for us to prepare your return.

1. **Government issued photo ID for you and your spouse if filing a joint return**

2. **Social Security document for you and every person claimed on your tax return**.
   This can be a Social Security Card, Form 1099-SSA if it contains your full Social Security Number or a letter from the Social Security Administration with your social security number on it.

3. **If you were issued a PIN by the IRS because of identity theft, bring the letter received from the IRS indicating the PIN. Your return will be rejected by the IRS without this number**

4. **Bring any other notices received by the IRS**

5. **The folder we gave you last year with last year's returns and tax documents**

6. **Checkbook if you want to direct deposit any refunds or direct pay any amounts owed**.

7. **All of your current tax year income documents such as:**
   - W-2 (Wages)
   - W-2G (Gambling winnings)
   - 1099 (Interest, dividends, security sales)
   - 1099-G (State income tax refund) You must get this online from the NJ Treasury by going to https://www1.state.nj.us/TYTR_Saver/jsp/TGI_1099/NJ1099Login.jsp
   - Unemployment compensation statements 1099G. You must get this online from NJ Unemployment by going to https://myunemployment.nj.gov/ (see above)
   - Social Security SSA-1099 or Railroad Retirement (RRB-1099 Tier 1 &2)
   - Amount of any Alimony received or paid and date of divorce agreement. If Alimony was paid, SSN for recipient(s) (may be on prior year return)
   - Brokerage statements
   - End of year pay stub (with breakdown of deductions, etc.) if applicable
   - Health insurance documents received from the government insurance marketplace, your employer and/or your insurance provider. 1095-A, 1095-B, 1095-C. 1095-A is required if insurance was purchased from the Marketplace.
   - Any other income documents.

8. **Additional tax documents or information such as:**
   - PTR amount received in the current tax year and form PTR-1 or PTR-2 from last year and this year (if available). While we are not completing PTRs this year, we need your base property tax amount to complete your NJ tax return
   - Forms and/or cancelled checks as a record of all Federal and State Taxes Paid in the current tax year including any estimated tax payments
   - Contributions to HSA (Form 5498-SA (if you have one) and distributions from an HSA (health savings account), if you have one (Form 1099-SA)

MORRIS COUNTY TAX AIDE INFORMATION

What to bring with you and do before your visit

- Child dependent care provider information
- Mortgage interest statement (Form 1098)
- Property tax statement and /or postcard from your local tax office or other records of property tax paid (should include Block, Lot and Qualifier);
- Form 1098-T showing college costs paid and any scholarship amount
- Purchased a new vehicle? (Bring documentation of sales tax)
- Sold a home? (Bring closing documentation) If received, bring form 1099-S
- Have debt from a credit card cancelled/forgiven by a commercial lender? (Bring 1099-C)
- Receive a First Time Homebuyers Credit in 2008? (Bring repayment letter)
- Amounts of Economic Impact Payments you may have received. Use EIP Worksheet for help.
- Did you, your spouse or a dependent have Covid-19 and have a retirement/pension distribution? Use the Covid Retirement Distribution Worksheet

HEALTH INSURANCE

The State of New Jersey requires that every person on the tax return have Minimum Essential Coverage health insurance or be eligible for an exemption. Be prepared to answer the following questions as part of the preparation of your tax return:

1. Did you have health insurance coverage for you, your spouse, and all qualifying dependents for the entire current tax year? If not, for which months did you have health insurance coverage?

2. Did you, your spouse, or any of your qualifying dependents purchase health insurance from the Health Insurance Marketplace (also known as The Exchange)? If yes, you will need to bring form 1095-A which you should have received from The Marketplace.

3. If you did not have health insurance that meets the Minimum Essential Coverage requirements for any month in the year, we will explore your eligibility for an exemption. If you do not qualify for an exemption, you will be required to make a Shared Responsibility Payment as part of your current year taxes.

Note: Medicare Part A and some Medicaid coverage qualifies as Minimum Essential Coverage.

Calls from AARP Tax-Aide will appear on your caller ID as
(617) 675-4444