

What You Need for Your Tax Appointment

To ensure the safety of our clients, volunteers and staff during this time of uncertainty due to COVID-19, CAP Services will provide tax preparation services by **drop-off only**. The list of items below is for your reference. Please compile these items before making your tax appointment.

General Items:

- A **copy** of the original social security card for **each person** listed on your tax return, including children and/or dependents (NO ORIGINALS)
- A **copy** of a Driver's license or other state- or federally-issued photo ID for all adults listed on your tax return (NO ORIGINALS)
- Bank account information for direct deposit of refund
- Form 1095-A** showing Marketplace health insurance coverage
- Letter from the IRS with your **Identity Protection Pin** number
- Divorce decree, QDRO, and/or IRS Form 8332 to allow child deductions
- Economic Impact Payment** letter

COPIES of all documents showing income you received for 2020 including:

- W-2 from jobs
- Tip income
- Scholarships
- Interest or dividend statements
- Alimony or maintenance payments
- Cash Income
- Stocks or bonds statements
- Sale of main home worksheet (enclosed)
- Other disability income (1099-R or W-2)
- Retirement income statements
- Unemployment income
- Social Security income (1099-SSA)
- Statements showing Federal and/or State SSI benefits
- Child support or Kinship care
- Wisconsin Works payments
- Military compensation (taxable and nontaxable)
- Total rent deducted for services as a resident apartment manager
- Any other income documents

COPIES of all documents showing expenses you had in 2020 including:

- Alimony or maintenance paid
- Education payments (tuition, books, etc.)
- Out of pocket medical expenses (such as after-tax premiums)
- Receipt(s) for real estate taxes paid
- Child or dependent care receipts
- Educator expenses
- Student loan interest
- List of charitable cash contributions
- Contributions to Health Savings Account (5498-SA or 1099-SA)
- Credit Card cancellation of debt
- Adoption of a child
- Purchase/installation of energy efficient home items
- Estimated payments for Federal and/or State taxes
- Purchases made outside Wisconsin for use in Wisconsin for which no sales tax was charged
- Rent Certificate and/or Property Tax Bill