



TAX PREP CHECKLIST



1 Have Your Personal Information Ready

- ☐ Do you have a government ID (state ID, military ID, driver's license, or passport)?
- ☐ Do you have a permanent address?
- ☐ Do you have a Social Security number or Individual Taxpayer Identification Number?
 - If you are married, have children or are caring for an elderly parent in your home you'll need their Social Security number too.
- ☐ Do you have a bank account and know the bank's routing number?
- ☐ Did you file taxes last year?

2 Gather Work, Scholarships, Income, and Earnings Documents

- ☐ Did you work as an employee in a part-time or full-time job?
- ☐ Did you work as a contractor, freelancer, or self-employed?
- ☐ Did you receive unemployment compensation?

3 See If You Qualify For Cash Back Tax Credits

- ☐ Did you earn at least \$1 in the tax year? Tax credits put money back in your pocket.
- ☐ Are you a parent?

4 Get All Your Federal Stimulus Checks and Advance Child Tax Credit Payments

- ☐ Did you receive the third federal stimulus check?
- ☐ Did you receive the Advance Child Tax Credit payments?

5 Schedule a Free Tax Appointment or File Yourself For Free!

- ☐ Do you want free help filing your taxes from an IRS certified and trained tax volunteer?
- ☐ Do you want to file your taxes for free yourself?



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