

Taxpayer Information – Tax Year 2014

YOUR APPOINTMENT: **Date** _____ **Time:** _____

If you must cancel your appointment, please inform the Library as soon as possible, so that another taxpayer may be called to fill that time slot. 516 794-2570, ext. 216

You will need to bring the following to your appointment:

- Your photo ID
- Your Social Security card – or if you are collecting social security, your 1099SSA information
- Social Security cards for dependents
- All tax statements for the year for which the return is being prepared
- Copies of last year's returns - if last year's returns are not available, you must know if a NY State refund was received last year, and if so, was an itemized deduction taken, and were state and local income taxes deducted on schedule A. You must also know if there was a capital loss carryover last year.
- *No returns will be prepared for adult children who are not present.*

Joint Returns

- Both spouses must be present to sign the form – *The only exception to both spouses being present is if one spouse is disabled, and a doctor, hospital, or nursing home's note is presented on the responsible organization's official letterhead*
- Both spouses must provide a photo ID
- Both spouses must bring social security card, or 1099SSA

Filing "Married Filing Separately"

- Your spouse's SS# and AGI (adjusted gross income) must be provided
- You must know whether your spouse has already filed a return
- You must know whether a standard, or itemized, deduction was taken by your spouse
- If dependents are involved, the you should be in a position to indicate whether there is a credible agreement as to which spouse takes the exemptions

Please Note:

- If a 1099B (sale of stock or mutual fund) is presented, there be no more than 6 transactions
- If a 1099B (sale of stock or mutual fund) is presented, the date of purchase and basis must be provided. *If this information is not on the broker's statement, the taxpayer must ask the broker, or consult an historical price web site to establish a credible cost basis.*
- If itemized deductions are to be taken, the amounts of medical, prescription drug, supplemental medical insurance premiums, and dental bills should be calculated by the taxpayer, along with any charitable contributions, and clearly presented in written form for the tax counselor.
- All tax documents should be removed from envelopes, in order to expedite your processing time.