Items and Documents to Bring With You

This list is not complete. Every person is involved in a different tax situation. You may not receive all of the listed documents. If in doubt, it is better to bring an unlisted document with you to avoid needing to return home to retrieve it. It is easier and more accurate if you complete the intake paperwork, including IRS 13614-C at home. It also saves you time and may help you get your taxes completed sooner at walk-in sites. Pick up an intake packet at an open tax site or at the Old Town Library, Windsor Library, or download and print the forms from www.makechangenoco.org before you arrive.

Identification and Personal Items

- Social Security Card or ITIN for everyone listed on the tax return. Photocopies and legible photographs are accepted.
- Photo Identification for the primary filer and spouse. IDs must be valid and unexpired. Photocopies and legible photographs are acceptable.
- Completed, signed, and dated form 8332 if you are granting or accepting dependency for a shared child.
- Notarized, Colorado Durable Power of Attorney or a similar form granting permission to prepare taxes for each filer not present. IRS 2848 is not acceptable.
- Masks and other PPE may be required if mandated.
- A voided check or direct deposit information for a refund.
- Any letters and correspondence received from the IRS and CO for the last 3 years.
- Your previous year tax return.

Income

- W-2 for each job worked.
- 1099-NEC, 1099-MISC, 1099-K, and records of cash receipts for all small business, contractor, and gig job worked.
- W-2G and records of cash winnings from prizes, lotteries, raffles, gambling, etc.
- 1099-G for each unemployment claim.
- Records of Alimony paid or received, date of divorce decree and ex spouses' Social Security Number.
- 1098-T, 1099-Q, Scholarship, Grant, and Bursar's (student account) statements.
- SSA-1099 and 1099-R(s) for each retirement account you received distributions.
- 1099-INT, 1099-DIV, 1098-B, records of interest received for all investment and bank accounts.
- Complete investment / broker statement.
- 1099-S and basis for all reported properties sold.

Expenses

- Medical bills, insurance premiums, long-term health care contracts, HSA Contributions and Distributions, and any other health expenses paid by you. Categorized and totaled by type and patient.
- W-2G State Tax Refund and 2022 tax return if you itemized in 2022.
- Property Taxes paid in 2023.
- Interest on your home paid in 2023. (1098)
- Personal property taxes paid such as license plates.
- Charitable donations categorized totaled by charity and a grand total for all charitable giving.
  - Non-cash donations are limited to $500.
- Business expenses categorized and totaled.
  - Record of business mileage, commuting mileage, and other mileage.
- Educational expenses organized and totaled by type and student.
- 1098-E or amount of student loan interest paid in 2023.
- Child Care Expenses and information about the child care provider(s) organized and totaled for each child.
  - The information should be a year-end accounting for each child and must contain the provider's name, address, and tax ID number.
- Verifiable gambling loses to offset winnings
- 1095-A, 1095-B, 1095-C health insurance forms.