Tax-Aide Hawaii Document Checklist TY2024

You must bring:

- ☐ Photo ID for taxpayer and spouse (if filing a joint return). Not required for dependents.
- ☐ Social Security cards and/or ITIN notices/cards or other official documentation that show the taxpayer identification numbers for taxpayer, spouse, AND EACH dependent on the return.
- ☐ Blank check or bank statement showing the full account number if you want to direct deposit any refund(s) or direct debit any amounts due. ***Deposit slips are not acceptable***.
- ☐ Identity Protection PIN (IP PIN) Letter from the IRS (for each individual if applicable).
- ☐ *Optional but highly desirable:* Last year's federal and state tax returns.

Income

- ☐ W-2 from each employer.
- ☐ 1099-G form for Unemployment Compensation or state/local income tax refunds.
- ☐ SSA-1099 form reporting Social Security benefits paid to you for the year, or RRB-1099, Tier 1 Railroad Retirement benefits form.
- ☐ 1099 forms (or other statements) reporting interest (1099-INT), dividends (1099-DIV) and/or proceeds from sales (1099-B), plus documentation showing the original purchase prices if you sold stocks or other assets.
- ☐ 1099-R forms for any Pension, Annuity, or IRA distributions.
- ☐ 1099-NEC, 1099-MISC, 1099-K, or other 1099 forms.
- ☐ If you have a business, bring a summary list of all your income (cash and non-cash) and all business-related expenses, including vehicle mileage, to complete our ***Self-Employment Worksheet***.
- ☐ Information about any other income not reported on a form, including cash or other than cash (barter).

Payments

- ☐ Records of any federal and/or state income tax paid during the year if not shown on income documents. Includes quarterly estimated tax payments.

Deductions

If you have a substantial amount of deductions, you may want to itemize. If so, complete our ***Itemized Deductions Worksheet*** and bring the following:

- ☐ 1098 form showing home mortgage interest.
- ☐ Separate summaries of CASH and noncash contributions to charity.
- ☐ Amount of property taxes paid during the year (frequently shown on your mortgage statement).
- ☐ Amounts of unreimbursed business expenses related to your job or expenses related to your investments.
- ☐ A summary list of medical/dental/vision expenses including doctor and hospital bills and medical insurance premiums, prescription medicines, medical portion of assisted living services, long-term insurance premiums, and expenses for medical-related home improvements such as ramps and railings for people with disabilities and/or vehicle modifications to accommodate a disability.
- ☐ Invoices showing sales tax paid on large purchases (car, boat, plane, etc.) if you want to claim the state sales tax deduction instead of the state income tax deduction.

Health Insurance

- ☐ 1095-A forms if you purchased insurance through the Marketplace (Exchange).
- ☐ Any exemption correspondence from the Marketplace (if applicable).

Credits

- ☐ Dependent care provider information – name, address, telephone number, employer ID or Social Security number, General Excise Tax (GET) number, and amount paid to the provider for each child.
- ☐ 1098-T form for Education expenses plus statement of account from the Educational Institution showing tuition and fees actually paid and Scholarships, Grants, etc. received. Also bring a summary of any other education expenses to complete our ***Education Credit Worksheet***.
- ☐ 1098-E form or letter from lender for Student Loan Interest.
- ☐ Name, address, and GET number **of your landlord** for the Hawaii Low-Income Renter Credit