

A federal tax **REFUND** may be waiting for you

Be Prepared



When you use a tax preparer to help you file and claim the Earned Income Tax Credit (EITC), Child Tax Credit (CTC) or American Opportunity Tax Credit (AOTC), take these items with you:

- Driver's license or other valid photo ID (if filing a joint return, bring a photo ID for your spouse, and to e-file, both spouses must be present to sign forms)
- Valid Social Security card or verification of Social Security number or other federal tax identification number for all persons listed on the return
- Birth dates for all persons listed on the return
- All statements for income received such as wages, unemployment, non-employee compensation, interest, dividends, pension, Social Security benefits, stock sales, or other income, and any statements showing taxes withheld
- If self-employed, records of all business income and expenses
- Records of expenses paid for higher education including Forms 1098-T, Tuition Statement
- Records of child and dependent care expenses paid as well as the caregiver's name, address and Social Security or other federal tax identification number
- Bank routing number and account number to directly deposit your refund
- Copy of last year's federal tax return if available

Your tax preparer, whether paid or volunteer, is required to ask questions to determine your correct income, expenses, deductions and the amount of your credits and your eligibility to claim them. Give your preparer all the needed information and answer all questions. A paid preparer must sign your tax return and use a preparer tax identification number.

