



## **LIFT-Evanston Tax Services**

### Eligibility Information

#### **I. LIFT-Evanston *cannot* file your return if:**

- You earned **over**:
  - \$50,000 with qualifying children
  - \$25,000 if single
- You or your spouse itemized deductions on last year's tax return.
- You or your spouse mortgaged or rented-out property (such as house or land) in 2011.
- You or your spouse owned stocks, mutual funds or cashed a CD in 2011.
- You or your spouse was a member of the armed forces in 2011.

#### **II. All tax clients must bring:**

- **A valid picture ID** of yourself
- All **W-2, 1099** and income/expense-related forms
- A **copy of last year's tax return**, if you have one
- The **Social Security Cards** or the Tax Identification Numbers (ITIN) cards for everybody shown on your tax return (including dependents)

#### **III. There may be additional forms needed:**

- 1) **If you are married and filing a joint return with your spouse**, both you and your spouse will need to be present during the appointment.
- 2) **If you have a checking account and want your refund to be deposited into it**, please bring your check book.
- 3) **If you or your spouse received unemployment compensation in 2011**, please bring a copy of your 1099-G form.
- 4) **If you or your spouse received any social security benefits in 2011**, please bring a copy of your SSA-1099 form.
- 5) **If your or your spouse earned interest over \$50 in a savings account or saving bond in 2011**, please bring a copy of your 1099-INT form.
- 6) **If you or your spouse transferred or withdrew funds from an IRA in 2011**, please bring a copy of your 1099-R.
- 7) **If you or your spouse paid or received alimony in 2011**, please bring a record of the amount pay or received.
- 8) **If you or your spouse or a dependant paid tuition in 2011**, please bring a copy of your 1098-T form.
- 9) **If you or your spouse paid interest on a student loan in 2011**, please bring a copy of your 1098-E form.
- 10) **If you received an advance on your child tax credit this year**, please bring a copy of IRS Notice 1319. If you do not have this form, please tell the tax preparer of the child credit advance during your appointment.
- 11) **If you or your spouse paid for child care (day care, summer day camp, after school programs or a baby sitter legally paid) you could receive a credit.** Please bring the child care provider's full name, address and amount paid. Also bring the provider's social security number (SSN) if they are an individual or employer identification number (EIN) if they are an organization. You will need to call the child care provider to obtain this information.

#### **IV. If any of the necessary forms have not been mailed to you, you must call the company or government agency to have a copy of the correct form(s) sent.**