

2024 Tax Year Income Preparation
VITA Screening & Document Checklist
Do you qualify for Free VITA tax prep?

- Yes ___ No ___ Income (gross) above \$60,000 (all filing statuses, including married filing jointly)
- Yes ___ No ___ Portfolio transactions (stocks & bonds) above \$60,000
- Yes ___ No ___ Self-employment income with expenses exceeding \$60,000
- Yes ___ No ___ Business loss or Carryover Business loss
- Yes ___ No ___ Casualty Loss
- Yes ___ No ___ Received, bought, or sold cryptocurrency/bitcoin in 2024
- Yes ___ No ___ Debt cancelled (credit card/loan) from a bankruptcy filing
- Yes ___ No ___ Rental Income

If you answered **YES** to any of the above, unfortunately, your return is outside the scope of our program. You should seek the services of a paid preparer. VITA prepares only Individual Returns on Form 1040 and/or 1040-SR.

Schedule through April 15th for timely filing: <https://vitaprogramuwguc.setmore.com> or by calling [\(201\) 201-4522](tel:2012014522) / [\(908\) 353-7171](tel:9083537171) or email VITA@unitedwayguc.org

Essential documents needed to process your tax return:

- Completed Intake Form 13614-C
- Signed Form 14446 (page 3) Virtual VITA/TCE Taxpayer Consent
- Identifications: Photo ID issued by any Government/State/City/School
- Social Security card(s) or (ITIN letter(s)) for all persons on the return
- Copy of your 2023 tax year return
- Identity Protection PIN for identity theft victims.
- Bring any IRS or State tax notices received
- Form 1095-A if covered under the ACA (Affordable Care Act), Get Covered NJ

INCOME:

- Wage and other Income statement(s): Forms W-2, W-2G, 1099-MISC, 1099-NEC
- Unemployment Income: Form 1099-G statement
- Self-employed Income (Form 1099-NEC, 1099-K, 1099-MISC, including Cash)
- Pension Distribution/Income: Social Security: Form SSA-1099, Form 1099-R/RRB
- Interest and dividends Income (1099-INT, 1099-DIV)
- Alimony Income received
- Other Income: Lottery, state income tax refunds, scholarships/fellowships, prize/awards

Direct Deposit: It is the fastest and safest way to receive your refund. Bank Name, Routing & Account number are needed for your Savings & Checking account.

EXPENSES: Please bring documentation for any of the following:

- Daycare or Childcare Expenses: Provider's Name, Address, and EIN # needed
- Mortgage Interest and/or Property Tax statements
- Business expenses
- Alimony paid (Name & SS # of spouse needed)
- Rent paid in 2024 – Your name must be on the lease (room rental does not qualify)
- Medical expenses: out-of-pocket & unreimbursed - doctors/dentists, prescriptions
- Gifts to charity, documentation needed. Cash donations must be separated from non-cash
- Higher education expenses: Form 1098-T from college & printout of college account
- Student loan interest paid (Form 1098-E)
- Misplaced/Lost documents: Please call the appropriate issuing agencies for duplicate copies

219 Central Avenue
Rahway, NJ 07065
Tel: 908-353-7171
www.uwguc.org



LIMITED SCOPE OF VITA:

Taxpayers owning a business are limited to the following:

- Must have had only 1 business, no employees
- Business home use deduction disallowed
- Depreciation and amortization deduction disallowed
- Actual expenses disallowed, only the standard mileage will be used
- Cannot have inventory at any time during the year
- Cash accounting is the only method allowed for VITA
- Non-Cash charitable donation deduction is limited to \$500

Clients should seek a paid preparer if your return falls outside the scope of the VITA program.

Married Filing Joint return:

Signatures/consent of both spouses are required on Form 8879 for e-file submission.

Married Filing Separate returns:

Spouse's Name and SSN are required for IRS e-file.

Health Insurance Coverage proof is required for NJ. Bring Form 1095-B or 1095-C.

All VITA returns with exceptions of ITIN number application will be electronically e-filled.

United Way of Greater Union County

219 Central Ave, Rahway NJ, 07065

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