Tax Organization Worksheet for Using MyFreeTaxes Site or Coach

Important Keep with Tax Documents

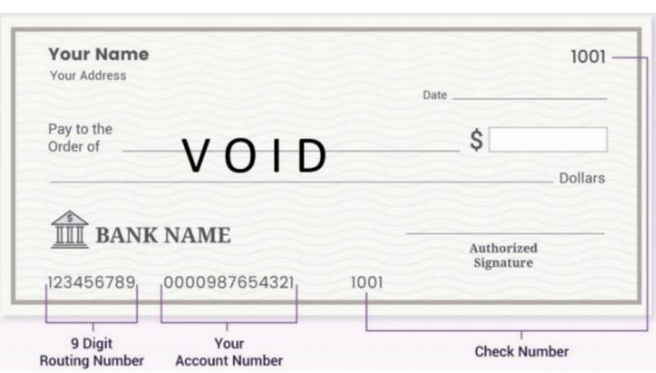
Complete this optional worksheet to get organized ***BEFORE*** you log into the software or meet with the VITA coach, it will save you time and help prevent errors.

The use of this worksheet is for guidance only. The taxpayer is responsible for the information entered on their tax return submitted.

You will need:

- ☐ Email address____ (if you have a cell phone you have an email address)
    - If you do not have an email, you use your browser and search for how to set up an email address.
- ☐ Your phone number______________________________________
- ☐ Your mailing address (street, apt., town, state, zip) ______________________
  ____
- ☐ County of Residence___________________________
- ☐ User name you want to use____
- ☐ Password you want to use____
- ☐ Social Security Cards for taxpayers and dependents (ITIN if no SSN)
    - *Very important to use legal name, initials, etc. as printed on the Social Security Card.*
    - *Bring if meeting with coach*
- ☐ Photo Identification (will need if meeting with coach)
- ☐ Birthdates of tax payers and dependents
    - Taxpayer___________________________
    - Spouse____________________________
    - Dependent (Name and birthdate) _________________________
    - Dependent (Name and birthdate) _________________________
    - Dependent (Name and birthdate) _________________________
    - Dependent (Name and birthdate) _________________________

- ☐ Your Banking Information (if using electronic deposit or payment)



- Bank Name________________________________
- Routing Number___________________________
- Account Number__________________________
- Account Type ____Checking ____Savings

- ☐ Last year's federal tax return
- ☐ All income information (W2s, 1099s, self-employment income, etc.)
- ☐ Access to secured wifi/wired connection
- ☐ 60-90 minutes
- ☐ Highlighter, crayon, or colored pen helpful

Let's get organized!

1. Take all of tax documents out of their envelopes.
2. Gather or Print any tax documents that were sent electronically to you.
3. Organize into these piles: **1) Income; 2) Expenses; 3) Other**

Income Pile Income Pile Income Pile Income Pile Income Pile

(Check if you have these forms and fill in information)

☐ **W-2** Wages and Salary for ALL jobs held during the tax year for all tax payers (list)

- ○ ______________________________ ○ ______________________________
- ○ ______________________________ ○ ______________________________
- ○ ______________________________ ○ ______________________________

☐ **1099-R Retirement Income or Social Security Benefits SSA-1099 or RRB-1099**

- ○ ______________________________
- ○ ______________________________
- ○ **If you took an early distribution from a retirement account, what was the reason? ______________________________**

- ○ **Did you receive a distribution from ANY local, state, or federal pension)?**
  ☐ **Yes** ☐ **No**
  - ▪ *This includes MOSERS, LGERS, Office of Personnel Management, MU Retirement, etc.)*
  - ▪ *On the Missouri Return you will follow the prompts.*

☐ **1099-Int, 1099-Div, 1099-B or 1099 Consolidated** for interest and dividends, capital gains. (list)

- ○ ______________________________ ○ ______________________________
- ○ ______________________________ ○ ______________________________
- ○ ______________________________ ○ ______________________________

☐ **1099-G Unemployment Compensation**

- ○ ______________________________
- ○ ______________________________

☐ **1099-G** refund of state/local income taxes________________________

☐ **Alimony income or separate maintenance payments? ____________**

Income Pile Continued

☐ **1099-Misc, 1099-NEC, 1099-K, cash, digital assets or other services**

- ○ ______________________________ ○ ______________________________
- ○ ______________________________ ○ ______________________________
- ○ ______________________________ ○ ______________________________
- ○ ______________________________ ○ ______________________________

☐ **A 1099 NEC or MISC may prompt for personal business information and to link to a Schedule C. (Schedule F is out of scope) Choose your business code and answer questions about your business.**

☐ **Other income not reported on W-2 or 1099** (list) gambling, lottery, prizes, awards, jury duty, digital assets, Sch K-1, royalties, foreign income etc.

- ○ ______________________________
- ○ ______________________________
- ○ ______________________________
- ○ ______________________________

☐ **Did you have gambling losses? ____________How much**? (your losses cannot exceed your winnings)

☐ **Other Income received with or without forms (describe)**

- ○ ______________________________
- ○ ______________________________
- ○ ______________________________
- ○ ______________________________

Expense Pile   Expense Pile   Expense Pile   Expense Pile

☐ **Alimony income** or separate maintenance payments? ________________
- SSN of recipient___________________________

☐ **Medical & Dental (including insurance premiums NOT included on W-2, 1099-R, or SSA-1099 (list $ amount)**
  - Supplemental Medical Insurance (annual amount) ______________
  - Prescription Insurance (annual amount) _______________________
  - Long-Term Care Insurance (annual amount) ____________________

☐ **Mortgage Interest Form 1098**

☐ **Day Care** (for while you worked, looked for employment, or attended school)
☐ Day care provides amount paid and the EIN or SSN number for provider along with name of child.
  - _________________________________
  - _________________________________
  - _________________________________

☐ **Expenses related to self-employment or other income received (list documented business expenses)**
  - _________________________________ ○ _________________________________
  - _________________________________ ○ _________________________________
  - _________________________________ ○ _________________________________
  - _________________________________ ○ _________________________________

☐ **1098-E Student Loan Interest**__________________________

MO Property Tax Credit
☐ **Real Estate Taxes Paid**

☐ **Real Estate Taxes paid receipt** (for Property Tax Credit—income limits)
______________County $____________

☐ **Rent Paid for where you reside**
  - Landlord must provide Missouri DOR form 5674.

Other Pile   Other Pile   Other Pile   Other Pile   Other Pile

- ☐ **1098 T** Tuition, Scholarships *plus copies of other appropriate expenses*
- ☐ **Health Savings Account 5498-SA, 1099-SA, W-2 with code W**
- ☐ **Form 1099-C, 1099-A for forgiveness of debt**
- ☐ **1095-A Health Coverage through the Marketplace**

Information for which you may not have received a form but can be entered.

- ☐ **Are you an educator?** Worked more than 900 hours in K-12? Did you have qualified expenses? ______________ (how much)
- ☐ **Receive SSI?** expenses? _ year

- ☐ **For Missouri Property Tax Credit, were you or your spouse**
  - Age 65 or older
  - 100% disabled veteran
  - 100% disabled
  - Over the age of 60 and a surviving spouse

If you are missing any information do not log into the software until you have received all your current tax year information in the appropriate tax format.

Now, log into the software MyFreeTaxes at bit.ly/UMEMFT2023 and make your preferred selection. The "bit.ly" website is case sensitive, enter it as you see it into your web browser's address bar and hit enter.

As you enter information, highlight this worksheet and the document as a way to check your entries and to know that you have included the income, expenses and other information.

As you begin, you will answer some questions about income, if you exceed the amount for 2023, you cannot use the software and will need to seek another preparing option.

You are now ready to create your account in TaxSlayer (using the information from this worksheet). Follow the cues and complete your tax return.

When you are finished:

- ☐ **Print a copy of your 2023 Tax Return.**