

Preparing For Your Tax Return Appointment

- Do not come to the tax site if you have a fever or any Covid-19 symptoms.
- If married, both spouses must be present to sign the return.
- You must have the 8-page Intake Booklet (Form 13614-C) and 2-page Wisconsin Information Sheet filled out before your appointment. If you are unsure how to answer any questions, arrive early for us to give you guidance.

RETURNS WE CANNOT ASSIST YOU WITH

Although our tax counselors are trained to prepare the majority of tax returns, some taxpayers have situations that we are not trained for. If you have any of these situations, they are considered out-of-scope for us, and we will not be able to prepare your tax return.

The most common out-of-scope (OOS) situations:

- Married taxpayers who wish to file separately.
- People who divorced during the tax year.
- People who must file a tax return for a State other than Wisconsin.
- People whose business had a net loss, expenses over \$20,000, employee expenses, inventory, home office, or itemized auto expenses (standard mileage expenses are okay).
- Any rental real estate income or expenses (except for land rental only)
- Cancellation of a home mortgage debt
- Income reported on Form K-1
- Digital currency (bitcoin, etc.) ownership (buy, sell, or even just holding it).
- Casualty Loss Deductions (from flooding or other damage)
- A more complete list can be found at wi1.taxaide.aarpfoundation.org.

WHAT TO BRING – A list of what to bring is on the following page. In addition, if you will be claiming the following Wisconsin credits, you need to also bring:

TO CLAIM THE WISCONSIN HOMESTEAD CREDIT - You must bring a copy of your property tax bill or your original rent certificate signed by your landlord. If you are under 62 years of age, you must also either have earned income (a W-2 or business income) or provide us with a statement from your doctor, Social Security, or the VA, stating that you are permanently disabled. In addition to the income listed on the next page, we need proof of all non-taxable income including VA benefits and Social Security Disability Income (SSI).

TO CLAIM THE ELIGIBLE VETERANS AND SURVIVING SPOUSE PROPERTY TAX CREDIT

If you are eligible to claim this credit, you must bring with you:

- A copy of your acceptance letter from the State Department of Veterans Affairs – this is only required if this is the first time you are filing for the credit.
- A copy of the property tax bill or bills paid during the tax year.
- A receipt showing the taxes paid during the tax year. If you paid in installments, or paid taxes for more than one year, we must have receipts for all payments made.

WHAT TO BRING & HOW TO ORGANIZE YOUR TAX RETURN DOCUMENTS

In addition to the documents listed below, **remember to bring:** picture IDs, social security cards for everyone on the tax return, and a copy of the last tax return you have.

These documents must be filled out **completely:**

- **Form 13614-C – Intake/Interview and Quality Review Sheet (8-page intake booklet)**
- **Wisconsin Information Sheet (front and back)**

All tax documents must be removed from their envelopes. Please organize them in the order listed below. If you need to prepare more than one year of taxes, organize them and keep them separated when presenting them to our tax counselor.

1) INCOME

W-2 Wages
1099-G Unemployment
1099-G Box 2 State and local refunds
1099-INT Interest or 1099-DIV Dividends
SSA-1099 (the one with the pink stripe)
1099-R or RRB 1099R
1099-Misc
1099-NEC Non-Employee Compensation
1099-B Proceeds from Brokerage
W-2G Gambling Winnings
1099-Q Qualified Education Program
1099-C Cancellation of Debt
Alimony Received
Cash or prize Income Received
Any other income not listed above

2) ADJUSTMENTS

Health Savings Account
IRA contribution
Student Loan Interest
Educator Expenses
Alimony Paid

3) DEDUCTIONS

Medical and Dental expenses,
summarized by the following categories:

- Medical/Dental/Vision Insurance
- Doctor/Dentist
- Prescriptions
- X-rays, Lab Work, etc.
- Hospital
- Medical Aids
- Medical Mileage

Taxes you paid (i.e., Property taxes,
estimated taxes, sales tax on large items)

1098 Mortgage Interest

Gifts to Charity totals – cash or non-cash

Business Expenses summarized by
category

4) CREDITS

1098-T Education Credits

Residential Energy Credit (must have the
Qualified Manufacturer Identification #)

5) MARKETPLACE HEALTH INSURANCE

1095-A Health Insurance Statement

NEW FOR 2025

- If you claim the new deduction for vehicle interest, you must have the VIN number and a document showing how much interest was paid in 2025
- **Refunds by check may be delayed!** Bring your bank account information for direct deposit. If not, it may take a long time for the IRS to issue your refund.