

Preguntas si califican

En caso **afirmativo**, a cualquiera de las preguntas posteriores: Lo sentimos, no podemos completar sus impuestos en este momento. Pueden completar sus propios impuestos por un bajo costo a través de [Free Tax USA](#) o [IRS Direct File](#)

1. Está presentando su declaración como soltero o como casado que presenta una declaración conjunta?
 - a. **Soltero**: Sus ingresos anuales son más de \$75,000?
 - b. **MFJ**: Sus ingresos combinados son más de \$95,000?
2. Tiene una propiedad que usted alquila en los EE.UU?
3. Se ha declarado en bancarrota en los últimos 5 años
4. Tiene su propio negocio? Tiene gastos de más de 35,000?
5. Está usted casado pero hacen los impuestos separadamente
*NOTA: Si han llenado SOLTERO durante los últimos 5 años, califican
6. Eres un estudiante con visa F1?
7. Tiene una tarjeta de seguro social válida y un ID que pueda traer a su cita?
 - a. **Sí**: Deben traer la carta oficial del ITIN y su identificación a la cita
 - b. **No / Si está vencido**: No podemos hacer los impuestos del cliente sin un SSN o ITIN - Consulte los sitios gratuitos de ITIN en el sitio web de [Free Tax Help](#)

Qualifying Questions

If **YES**, to any of the questions: Sorry we cannot complete your taxes at this time. They can complete their own taxes for a low cost through [Free Tax USA](#) or [IRS Direct File](#)

1. Are you filing single or married filing jointly?
 - a. **Single**: Is your income over \$75,000?
 - b. **MFJ**: Is your combined household income over \$95k?
2. Have rental income from properties you own?
3. File for bankruptcy in the last 5 years?
4. Have self-employment expenses over \$35,000?
5. Are you married filing separately? *NOTE: IF they have filled SINGLE for the last 5 years they do qualify
6. Are you a student on a F1 visa?
7. Do you have a valid social security card and ID that you can bring to your appointment?
 - a. **Yes**: No further questions
 - b. **No**: Do you have a valid ITIN that is not expired?
 - i. **Yes**: They need to bring the official ITIN letter and their ID to the appointment
 - ii. **No / If it is expired**: We cannot do client's taxes without a SSN or ITIN - Refer to free ITIN sites on [Free Tax Help website](#)

- **Make sure that they bring social security cards or ITIN letters for themselves / spouse / AND ALL KIDS**
- **They also need to bring healthcare documents that shows how many months they received health insurance (Form 1095 A)**
- **IF CLIENT DOESN'T HAVE SS CARD PLEASE CHECK BELOW FOR EXCEPTIONS**

What to bring to your Tax Appointment

1. An official photo ID (like your driver's license) for you and your spouse.
2. Your original **Social Security card** or ITIN letter and cards of everybody who will be on your return, such as your spouse and children. We will need the actual cards; not just the numbers.
3. **If married** - Spouse must be present!
4. All of your official 2023 income documents. **Including last year's tax return.** Some of the common documents are: W-2

Other IRS Forms that they may have:

- Interest Income (1099-INT)
- Unemployment (1099-G)
- Retirement Income (1099-R)
- Social Security benefits received (1099 SSA)
- Forms 1095-A, B or C, Affordable Health Care Statements
- Child Tax Credit

If you are a student or attended university in the past:

- Tuition (1098-T)
- Receipts for textbooks or other supplies
- Student loan interest (1098-E)

If you have a child and are paying for childcare:

- Documentation of expenses
- Provider name, address, and tax ID

If they would like their refund by direct deposit:

- Voided checks

OR

- Bank account information (Account and Routing number)

Qué traer a su cita

1. Verificación de usted y su esposa/esposo con foto oficial.
2. Tarjeta de **seguro social o carta de ITIN** de todos en su familia (esposo/a e hijos) - Las tarjetas de seguro social o verificación con foto oficial de todos sus dependientes
3. **Si está casado/a** - esposa/esposo tiene que estar presente.
4. Documento de sus ingresos provisto por el empleador, normalmente w-2 y una copia de la declaración de impuestos del año pasado

Otros documentos del IRS:

- Ingresos de interés (1099-INT)
- Desempleo (1099-G)
- Retiro (1099-R)
- Beneficios del Seguro Social recibidos (1099 SSA)
- Seguro de salud - Formas 1095-A, B or C

Si eres estudiante o asististe a la universidad en el pasado:

- Gastos de educación - Matrícula (1098-T)
- Recibos de libros de texto y otros suministros
- Prestamos - (1098-E)

Si tiene hijos y paga por cuidado infantil / daycare:

- Documentos de las expensas
- Nombre del proveedor, dirección e identificación fiscal

Si prefiere recibir su reembolso por depósito directo:

- Cheques anulados
- Información de la cuenta bancaria (cuenta y número de ruta)

We do accept:

- Original copy of SS card / ITIN letter
- Form SSA-1099 (Social security benefits received)
- Any other verification issued from the SSA with **complete** SS number
- SSA verification documents with a truncated SSN (such as ***-**-1234) can be used as acceptable if they have gotten their taxes done with us the year prior
- Photocopies of SS card - **we accept but prefer original copy - so only approve if client says that's all they have but do not suggest**
- Cell phone photos of SS card / ITIN letter - **we accept but prefer original copy - so only approve if client says that's all they have but do not suggest**
- If a client has done their taxes for the last 3+ consecutive years, there can be an exception on SS / ITIN documents IF they have prior years documents

Do NOT accept:

- New client (never has done taxes with us before) without a SS card / ITIN letter or any documents above