



Food Bank's free online tax software provides eligible New Yorkers with free access to file themselves, helping them get the refunds and credits to which they are entitled. This includes the Earned Income Tax Credit (EITC)—a key piece of the public safety net, which alone can be worth MORE THAN \$9,000 for families. To use our software, you must meet one of the criteria below:

- **Your adjusted gross income (earnings) are \$84,000 or less in 2024.**
- **You are eligible for the Earned Income Tax Credit (EITC).**

TAXPREPARATION DOCUMENT CHECKLIST

Get organized before you file. Below are examples of documents you may need:

- ☐ **Picture ID** for yourself (and for your spouse, if you are filing jointly).
- ☐ **Social Security cards or ITIN** (copies or a letter from SSA or IRS letter for ITIN are also accepted as proof) for you and anyone you are claiming on your tax return. Medicare Card, SSA verification documents with a truncated SSN, (i.e., ***-**-1234).
- ☐ **Copies of all Forms W-2** for all jobs you held in the prior year (not last pay stub).
- ☐ **Form 1099 for other income** (i.e., bank interest, unemployment, self-employment, etc.) **OR 1098E, 1098T (Tuition)**
- ☐ **Form 1099-R, if you get a pension, or Form SSA-1099, if you get Social Security.**
- ☐ **Amounts of any other income** from your records (Jury Duty fees, cash earnings, etc.).
- ☐ **Form 1095-A** if you purchase health insurance through the Market Place.
- ☐ **Forgiveness of Debt (Form 1099-C).**
- ☐ **Income from the Sale of Stocks, Bonds or other Assets (Form 1099-B).**
- ☐ **Self-Employment Income** (reported on Form 1099-MISC or from your own business) and you incurred deductible expenses to earn your income. Expenses of \$35,000 and under.
- ☐ **NOTE:** To determine the **best EITC** you may be eligible for, please have your prior year Tax Return (**Form 1040, along with EIC Worksheets A & B**)
- ☐ **NOTE: NOTE: Economic Impact Payment (EIP) Notices 1444-C** that state any EIP received. If you do not have the notices, you must know amounts received in 2020 or 2021.
- ☐ **Child Tax Credit Letter 6419 from the IRS** that state any CTC received. If you do not have the notice, **you must know amounts received from July to December 2021.**

For more questions or assistance filing online yourself, call our partner Campaign for Working Families' tax line at 646-981-6111.