



# YOUR TAX PREP CHECKLIST

## Essential Items for Upload

- ☐ Valid picture ID
- ☐ Valid Social Security Card or Individual Taxpayer Identification
- ☐ Number (ITIN) for all family members
- ☐ For self-employed, all income and expenses
- ☐ Proof of income sources, i.e. W-2 and 1099 forms, Social Security statement
- ☐ Proof of expenses, i.e. child care, student loans, and medical expenses
- ☐ A copy of last year's federal and state tax returns

*Please note: Other documents may be necessary based on individual situations.*

## Safe, Secure Online Portal

Once you've collected all the items above, you can begin the process of getting your taxes prepared and filed for free by uploading all the documents to our online portal. To get started, visit:

[UnitedWayNNJ.org/FreeTaxPrep](https://UnitedWayNNJ.org/FreeTaxPrep)

## Questions?

For questions about the online filing portal or if you are experiencing difficulties getting started, email [UnitedWayTaxPrep@UnitedWayNNJ.org](mailto:UnitedWayTaxPrep@UnitedWayNNJ.org) or leave a message at **973.993.1160, x5** and a tax specialist will return your call.



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By securing racial and economic equity for ALICE® we can improve life for all.



United Way  
of Northern New Jersey