

For Free assistance in filing, please make sure you have the following necessary items when you go to a Tax Counseling for the Elderly site

For Federal & State Returns

- Valid Photo I.D.
- Social Security Card: (you, your spouse and all dependents)
- Last year's tax returns: (if available)
- Documentation for ALL income: (1099-SSA, pension income, IRA distributions, W-2's, interest income, etc.)
- If using Direct Deposit: a bank document (check, statement) which indicates Account & Routing Numbers
- If Claiming Child and dependent care expenses: the amount paid and the care providers name, address and identifying number
- If Itemizing: proof of all deductible expenses
- Paid Real Estate receipt
- **If claiming 1st time homebuyers or new car sales tax credit**: bring paperwork from close of house or purchase of new car

For MO-PTC (Rebate)

- Valid Photo I.D.
- A PAID real estate tax receipt (or) a receipt showing the entire amount of rent you paid during the *year (on official letterhead , or with your landlord's signature, address, SSN or FEIN and phone number)*
- If the property your home is on exceeds 5 acres, you must have a **statement from the County Assessor** showing the homestead portion.
- If you are a 100% disabled Veteran (as a result of service) you must have a **letter of proof from the Department of Veterans Affairs** to exclude VA income.