

If your answer results in a **STOP** at any step, we cannot prepare your tax return. There are specific scenarios that are Out-of-Scope for the Adams County Free Volunteer Income Tax Program, and we reserve the right to refuse service to anyone.

Step 1

Is your **total, combined income less than \$62,000?**

Yes. Continue to Step 2. **No. STOP** We cannot prepare your return.

Step 2

Do you have a **Government issued photo ID and Social Security Cards (or ITINs) for everyone on the return?**

Yes. Continue to Step 3 **No. STOP** We cannot prepare your return.

Step 3

Do you have **all income forms?** (W-2s, 1099s, 1098s, etc.)

Yes. Continue to Step 4 **No. STOP** We cannot prepare your return.

Step 4

Do you have **all deductible expenses?** (childcare, taxes paid, etc)

Yes. Continue to Step 5 **No. STOP** We cannot prepare your return.

Step 5

Do you have any **rental properties?**

No. Continue to Step 6 **Yes. STOP** We cannot prepare your return.

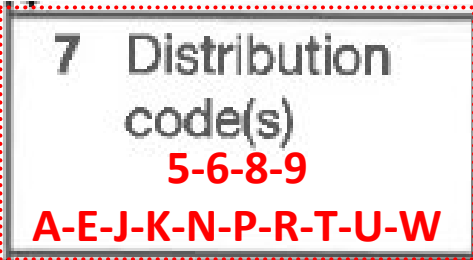
Step 6

Do you have **Form 1099-R** with any of the following **codes in Box 7?**

CORRECTED (if checked)

PAYER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and phone no.		1 Gross distribution \$	OMB No. 1545-0118	
PAYER'S TIN		2a Taxable amount \$	20XX	
RECIPIENT'S TIN		2b Taxable amount not determined \$	Form 1099-R	
RECIPIENT'S name		3 Capital gain (included in box 2a) \$	4 Federal income tax withheld \$	
Street address (including apt. no.)		5 Employee contributions Designated Roth contributions or insurance premiums \$	6 Net unrealized appreciation in employer's securities \$	
City or town, state or province, country, and ZIP or foreign postal code		7 Distribution code(s) A-E-J-K-N-P-R-T-U-W	8 Other \$	
10 Amount allocable to IRR within 5 years \$	11 1st year of desig. Roth contrib.	9a Your percentage of total distribution %	9b Total employee contributions \$	
12 State tax withheld \$	FATCA filing requirement <input type="checkbox"/>	13 State/Payer's state no.	14 State distribution \$	
15 Local tax withheld \$	Date of payment	16 Name of locality	17 Local distribution \$	

Form 1099-R Department of the Treasury - Internal Revenue Service



No. Continue to Step 7 **Yes. STOP** We cannot prepare your return.

Please Note: A copy of last year's tax return is extremely helpful to our Volunteers.