

Tax Document Scanning Days

at the Monson Free Library

presented by Melinda Arnold

When:

Wednesday, February 12, 2025 from 4:00pm-7:00pm

Saturday, February 22, 2025 from 10:00am-2:00pm

Cost: FREE! While I am not charging attendees for this event, donations to the Monson Free Library would be greatly appreciated.

Who: My returning or new tax prep customers who would like help scanning and uploading their tax documents to my customer portal. Using the portal to submit your documents is now required in order to be my customer.

What we will do:

I will add an account to my portal for each new or returning customer. Library staff members and I will also be available to help folks scan and upload their tax documents to my customer portal. Computers will be available to attendees during the timeframes above in order to complete account activation. If you have a smart phone, bring it along so I can show you how to activate your account that way and also how use the accompanying app. **Each person will take a number when they come in. Scanning and portal account setup should only take a few minutes. I cannot anticipate wait times. Please plan accordingly, and make yourself comfortable or explore the library while you wait.** If you want to bring a trusted friend or family member along for moral support or a second of eyes, please do!

What to bring: ***For confidentiality purposes, all documents must be brought in a folder***

Documents/information to bring with you (this list is not all encompassing):

- Your driver's license or state issued ID card
- Valid email address and phone number
- New customers need to bring a copy of last year's tax returns (federal and state)
- All wage/income documentation (W2, 1099-NEC, etc)
- Proof of health insurance (MA residents only): Form 1099-HC **or** your letter from MA Health (Form 1095-A if you received the Advance Premium Tax Credit)
- Social security number, address, birth date, and living situation for taxpayer, spouse, and/or any dependents.
- Total rent paid for 2024 or home mortgage interest statement (Form 1098)
 - For the MA Senior Citizen Circuit Breaker Credit, I need landlord name and address for renters. For homeowners I need assessed value of property, RE taxes paid in 2024, and total cost of water and sewer charges for 2024 (if applicable).
- Investment paperwork
- Life changes over the past year to note:

Marriage or divorce	Bought or sold a home
Inheritance	Change of address
Birth of a child	Retirement
Opened or closed a business (including rental property)	Disability income