

Poway TCE Tax Return Prep Essentials

Welcome to Poway TCE! Our IRS certified volunteers are here to help you prepare and e-file your Federal and California (full year residents only) tax returns for the 2025 tax year (filed in 2026).

Getting Ready for Your Appointment

To make your return preparation appointment go smoothly and quickly, please review the following information and complete any actions that pertain to you prior to coming to your scheduled appointment. Documents (including this document) are available for download at our website- PowayTCE.org.

If this will be the first time preparing your taxes at Poway TCE or your tax situation has changed significantly since your last year's tax return, please review the Out-Of-Scope tax situation listing available in the website resource section prior to scheduling your appointment. This listing provides some of the less common tax situations that Poway TCE is not certified to handle.*

What to Bring

A handy checklist for the items to bring to your appointment is provided in our website resource section.

- **Completed Intake/Interview Review Sheet:** If possible, download, print and fill out the 2025 Tax Preparation Intake/Interview and Quality Review Sheet (Form 13614-C) before coming to your appointment. If you can't download and print the 13614 form, please be sure to come 20 minutes before your scheduled appointment time to obtain a form and fill it out.

(Note: Page 4 The last page of this booklet includes a consent form (Form 15080). You only need to sign it if you want your info shared with other VITA/TCE sites in the future (totally optional). If you don't sign, it won't affect your 2025 tax return here.)

- **Identification Documentation:** Bring a government photo ID (like a driver's license) for all taxpayers to be included on the return.
- **Social Security Card/Tax ID:** Bring documentation indicating the Social Security Number (SSN) or Individual Tax Identification Number (ITIN) for all individuals to be included on the return. Acceptable SSN/ITIN documentation include SSN/ITIN cards (preferred), 2025 Social Security annual statements (1099-SSA) or a copy of your 2024 filed federal tax return (1040).

- **2025 Tax Documents:** All tax documents you may have received from your employer, banks, brokerages, Social Security statements, gambling winnings, health insurance, etc. Bring any tax document which has W2, 1095, 1098, 1099 on it in addition to anything without a tax document which indicates yearly income or deduction amounts.
- **Prior Year Returns:** Bring a copy of your prior year (2024) federal and state tax returns if possible.

If You're Married Filing Jointly (MFJ)

If you are filing MFJ, **both** taxpayers must come to the appointment unless you have a Power of Attorney (POA) for the non-present taxpayer (see next section).

Power of Attorney (POA):

If a taxpayer cannot attend the appointment, the person who comes to the appointment must provide a fully signed Power of Attorney (POA) for the absent taxpayer. A POA is only allowed in these situations: (1) the taxpayer(s) are out of town for an extended period that lasts past the tax filing deadline, or (2) the taxpayer(s) cannot be present due to medical reasons that will continue beyond the filing deadline. If the taxpayer is out of town but is expected to return before the filing extension deadline, a POA cannot be used—instead, an extension should be filed. Please note, however, that filing extensions are outside the scope of our services as mentioned above.

If you don't have an existing Power of Attorney (POA), please come see us several days before your scheduled appointment (on any day we are open). This will allow us to provide you with the necessary forms you need to bring to your appointment.

Itemized Deductions

If you itemized deductions last year or have larger than usual deductions for 2025, please organize and total similar costs (such as prescriptions, doctor visits, etc) and bring a summary page to your appointment. A fill-in summary page can be downloaded from our website resource page and printed. If you don't have a summary prepared **prior** to your scheduled appointment, time constraints may require that we schedule you for a follow-on appointment to finish your returns.

Other Things to Know

- **Non-English Speaking Taxpayers:** In general, Poway TCE does not have the ability to assist non-English speaking taxpayers unless they are accompanied by an English-speaking translator. If the taxpayer(s) are non-English speaking and cannot be accompanied by a translator, please contact us prior to scheduling an appointment to determine whether we can assist you.

- **Privacy:** As a privacy consideration, non-return preparation usage of cellphones, tablets, etc in our tax return preparation room is not permitted. Therefore, any information needed to prepare your return should be provided in **paper** form. If you have any tax return related information in electronic form, please print out a copy **prior** to coming to your scheduled appointment. Electronic forms may also be emailed to admin@powaytce.org if desired. All electronically submitted documentation will be deleted following your return preparation and acceptance by the IRS & FTB

***PLEASE NOTE:** Preparation of any particular tax return is up to the discretion of the preparing volunteer and/or Site Coordinator. The volunteer/coordinator may determine that we are not able to prepare your return and ask you to see another preparer if they don't believe that your tax situation and/or provided documentation meets our IRS certification requirements.