

Free **TAX RETURN PREPARATION**

College of DuPage employees, students and community members may schedule an appointment to get their federal and state tax returns prepared and electronically filed, free of charge, by IRS-certified COD accounting students under the supervision of faculty.

Visit [cod.edu\tax-prep](https://cod.edu/tax-prep) for dates and times and to schedule your appointment.

Student Resource Center (SRC), Room 3000
Park in Fawell Lot C2
Enter the SRC at Door 1



For more information, scan the QR code, contact us at taxprep@cod.edu or call (630) 942-3450.



For ADA accommodations, please email access@cod.edu with the event title in the subject line and your accommodation request. Please email two weeks in advance.



Tax Document Checklist

Paper copies of all documents are required. Those without paper documents will be rescheduled.

Documents to Bring to Your Appointment

- ☐ A Social Security card or Individual Taxpayer Identification Number (ITIN) for taxpayer and spouse
- ☐ A state ID card, driver's license or passport for taxpayer and spouse
- ☐ Form 1095-A (if insurance is provided by the Health Insurance Marketplace®)
- ☐ A copy of 2023 tax returns (federal and state)
- ☐ Bank account number and routing number for direct deposit

Income Documents

- ☐ W-2 Form (if applicable)
- ☐ Form SSA-1099 (Social Security Benefit Statement)
- ☐ Form 1099-K or 1099-NEC (if self-employed, e.g., an Uber driver)
- ☐ Form 1099-INT or end-of-year bank statement (interest from checking and savings accounts)
- ☐ Form 1099-DIV (dividend transactions)
- ☐ Form 1099-G (unemployment compensation)
- ☐ Form 1099-R (retirement plan/IRA distributions)
- ☐ Form W2-G (gambling winnings)
- ☐ Form 1099-B (stock transactions)

Adjustments/Deductions

- ☐ Form 1098-E (student loan interest payments)
- ☐ Educator expenses if you are a licensed K-12 classroom teacher
- ☐ A detailed list of charitable contributions
- ☐ Form 1098 (mortgage interest statement)
- ☐ Real estate taxes paid in 2023
- ☐ A detailed list of business expenses (if you are self-employed)

Child Care Expenses

- ☐ Child care expenses (provider's name, address and SSN or Employer Tax ID)

Higher Education Expenses

Student tuition and book expenses (1098-T, account statement, receipts for books and supplies); total in the following categories:

Expense	Amount
1. Tuition	_____
2. Fees	_____ (Academic fees only)
3. Books	_____ (Include only course-required books)
4. Supplies	_____ (Include only course-required supplies)
5. Room and board	_____ (Not a qualified expense)