

# The Legal Aid Society of Hawaii

## Tax Preparation Information for 2004

To qualify for help, you must be living within these income guidelines

Family Size	Maximum Yearly Gross Income	
1	\$25,824	The Project is funded by the Internal Revenue Service (IRS) to assist people living up to 250% of the poverty guidelines.
2	\$34,848	
3	\$43,872	
4	\$52,896	
5	\$61,920	

What to bring to Legal Aid tax preparation:

- Social Security numbers for each person who will be on the return
- For dependents, their date of birth
- A W-2 form for each job you had in 2003
- A 1099 form for other income received in 2003 (i.e. interest, dividend, and pension income)
- The amount you received in Social Security
- The amount you paid in childcare expenses and the name, address, SSN or EIN of the provider
- Your bank account and bank routing number if you want to direct deposit your refund

Sale of Property

- If you sold property in a taxable transaction (stocks, bonds, real estate, etc) you must know the sales price, date of sale, cost basis and date of purchase.

Higher Education

- You must know the amount you paid last year for higher education
- If you paid deductible student loan interest, you must know the amount

IRAs

- If you contributed to an IRA, you must know the amount of contribution

Teachers K-12

- Know the amount you paid in ordinary and necessary classroom expenses

Self-Employed/Small Business

- You must calculate your income and expenses yourself and bring the final figures. Expenses must be broken down into appropriate categories.

Itemized Deductions

- You must calculate your expenses yourself and bring the final figures.
- Expenses must be broken down into appropriate categories.

- For more information or an appointment, call the tax hotline at (808) 527-8050.
- Free help is limited by the number of tax preparers, hours of operation, and

difficulty of your tax return.