

## 2011 North Carolina State Taxes Checklist

To file your North Carolina and federal taxes, please bring the following:

- All documents listed on the 2011 Federal Taxes Checklist**
- Other state tax forms if you were a part-year resident and prepared a tax return for another state**
- North Carolina tax forms**
  - 2010 D-400 (needed to determine overpayments that should be credited to 2011)
  - 2011 D-410 (state extension request for filing the return)
  - 2011 NC-40 (estimated income tax payments)
- North Carolina Property Tax Relief**

If you own a home and want to apply for the property tax exclusion for elderly or disabled residents or for disabled veterans, you will need:

  - Your property ID number
  - Your federal tax return, if already completed
  - Income documentation, if you have not completed your tax return
  - Information about additional income that may not be included on the tax return
  - Your U.S. Department of Affairs file number, if you are a veteran
- All other income, expense, and tax documents from 2011 for you and/or your dependents, including:**
  - A physician or local health department's statement certifying that you, your spouse, or your dependent were unable to engage in any substantial gainful activity due to physical or mental impairment for the Credit for Disabled Taxpayer, Dependent, or Spouse
  - Statements you received from your employer or institution managing your retirement plan, summarizing the taxable amount of your retirement income AND information stating whether your retirement income falls under the Bailey Settlement
  - Documents showing amount of contribution to a tax deferred tuition savings program (North Carolina's 529 College Savings Plan)
  - Receipts or other documents showing purchases made to out-of-state vendors, such as those from the Internet
  - Documents that show education expenses for your dependent children who require special education and are in private school or homeschooled due to their disability