

# WHAT TO BRING TO YOUR TAX APPOINTMENT

To Schedule an Appointment Call  
East Bay Community Action Program, Office of Volunteer Services  
401-435-7876

- Driver's License/Government issued photo I.D. for you and your spouse
- If married and filing a joint return SPOUSE MUST BE PRESENT
- Social Security Card(s) for self, spouse and ALL dependents NO EXCEPTIONS
- For Direct Deposit – Bring A Check, or a Savings Account Number with Routing Number
- Prior tax years state and federal return. If you own your own home it is MANDATORY

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- Please bring all documents that prove source of income
  - All W-2s & Unemployment statements
  - All Forms 1095, Health Insurance Statements
  - Health Insurance Exemption Certificate
  - Social Security Benefit Statement-SSA 1099
  - All 1099's – interest/dividends/misc. income/gambling/cancellation of debt/pensions and annuities
  - Student loan statements – simple statement
  - Education credits for tuition and fees – Form 1098 T
  - Stock and Bond Statements
  - All HSA (Health Savings Account) documentation
  - Child & Dependent Care Expense – Day Care Statement (must include Tax Identification Number (SSN, EIN) of the care provider and amount paid- individuals who provided daycare need to provide a Social Security number
  - Property Tax Credit –For the elderly and disabled only. Rent Receipts or cancelled check and landlords name & complete address. If you own your own home bring your Real Estate Property Tax Statement.

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- Combined income may not exceed \$55,000.
  - We are unable to complete returns for individuals who own Rental Property or those who have Self Employment deductions over \$5000.00.
  - The VITA tax program does not process tax returns related to bankruptcy
  - Please call at least 48 hours prior if you need to cancel your appointment.
  - **By Appointment Only 401.435.7876**