

WHAT TO BRING TO YOUR TAX APPOINTMENT- If Applicable

- Proof of identification (photo ID, Valid Driver's License etc.)
- Social Security cards for you, your spouse and all dependents
- An Individual Taxpayer Identification Number (ITIN) assignment letter may be substituted for you, your spouse and your dependents if you do not have a Social Security number
- Proof of foreign status, if applying for an ITIN
- Birth dates for you, your spouse and dependents on the tax return
- Wage and earning statements (Form W-2, W-2G, 1099-R, 1099-Misc) from all employers and unemployment statements
- All 1099's – interest/dividends/misc. income/gambling/cancellation of debt/pensions and annuities
- Stock and Bond Statements
- Student loan statements – simple statement
- Education credits for tuition and fees – Form 1098 T
- Social Security Benefit Statement-SSA 1099
- A copy of last year's federal and state returns, if available
- Proof of bank account routing and account numbers for direct deposit such as a blank check
- To file taxes electronically on a married-filing-joint tax return, **both spouses** must be present to sign the required forms
- Total paid for daycare provider and the daycare provider's tax identifying number such as their Social Security number or business Employer Identification Number
- Forms 1095-A, B and C, Health Coverage Statements and Health Insurance Exemption Certificate if applicable
- All HSA (Health Savings Account) documentation
- Copies of income transcripts from IRS and state, if applicable
- Please bring all documents that prove source of income
- Prior tax years state and federal return, if you own your own home it is MANDATORY
- 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 canceled check and landlords name & complete address- If you own your own home bring your Real Estate Property Tax Statement
- Combined income may not exceed \$56,000
- 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