

If you will be filing a joint return, both spouses must be at the appointment. Total household income of generally \$60,000 or below.



Please bring the following to your VITA tax appointment

You MUST have a valid, working phone number with voicemail set up and a valid email address.

- Photo ID for you and your spouse
- Social Security cards and/or a Social Security number verification letter issued by the Social Security Administration for you, your spouse, and dependents that you are claiming
- Birth dates for you, your spouse, and dependents
- Wage and earning statement(s) from all employers, for each year you are filing (Form W-2, W-2G, 1099-R, 1099-Misc, SSA 1099)
- A copy of last year's federal and state returns OR Copies of income transcripts (if you don't have the previous years' return) from the IRS and state
- Interest and dividend statements from banks (Form 1099)
- Total paid for day care provider and the day care provider's tax identifying number (the provider's Social Security number or the provider's business Employer Identification Number)
- Bank routing numbers and account numbers for direct deposit. Blank check or bank statement required. We cannot use a deposit slip
- 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

You may or may not have the following items. If you have any of these, bring them to your appointment.

- If you are self-employed, bring a list of your business expenses, totaled by category. Mileage should be listed by month, OR miles from January to June and miles from July to December. Also bring 1099-NEC's and cash payments.
- IPIN, if you need one
- Health Insurance Exemption Certificate, if received (1095-A)
- Any letters received from the IRS
- Mortgage interest (1098), property taxes, charitable contributions for each year
- Vehicle registration (tags/plates)
- Student loan interest, education expenses
- Out of pocket medical payments, includes Medical, Dental, Vision, Hospital, Pharmacy - yearly totals for each.
- List of medical expenses, including mileage to and from medical appointments and out-of-pocket insurance premiums
- Teachers- list of classroom expenses