

Please Note: if you will be filling a joint return, both spouses must be at the appointment.

Total household income generally \$ 67,000 or less.



The **Iowa** Center

You must bring the following to your VITA tax appointment:

1. Photo ID for you and your spouse
2. Social Security cards or ITIN letters (or Social Security Number or ITIN verification letters issued by the Social Security Administration) for you, your spouse, and anyone you supported during the year (digital or photocopies allowed).
 - If you do not have your social security card, you can get a free replacement card. Information about acquiring a replacement card is found on this Social Security Administration webpage: <http://www.ssa.gov/ssnumber>.
3. Wage and earning statement(s) from all employers, for each year you are filing (Form W2, W-2G, 1099-R, 1099-Misc, SAA 1099)
4. A copy of last year's federal and state returns OR copies of income transcripts (if you don't have the previous year's return) from the IRS and state.

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

1. If you are self- employed, bring a list of your business expenses, totaled by category, including mileage record. If you are a teacher, bring a list of classroom expenses.
2. IP PIN (Identity Protection PIN), if you need one.
3. Health Insurance Exemption Certificate, if received (1095-A)
4. Any letters received from the IRS.
5. Interest and dividend statement (form 1099)
6. 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)
7. Bank routing numbers and account numbers for direct deposit. Blank check or bank statement preferred. We cannot use a deposit slip.
8. A completed intake form, if possible. This will make preparing your return faster and make sure that you have the information you need with you.
 - Intake form for citizens, green card holders, and other residents for tax purposes

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

