

What to Bring to Your Local VITA Site?

- ➔ Social Security Cards or ITIN and Birth dates for **EVERYONE** on the tax return
- ➔ **Proof of photo identification** for both Taxpayer and Spouse (if applicable)
- ➔ **Copy of prior year tax return**
- ➔ Proof of **Bank Account and Routing number** for Direct Deposit/Debit
- ➔ **Identity Protection PIN** number (IP PIN), if issued for **ANYONE** and/or EVERYONE on the tax return.
- ➔ Proof of foreign status, if applying for an ITIN
- ➔ Wage and earning statements (Form W-2, W-2G, 1099-R, SSA-1099, 1099-Misc, 1099-NEC) from all employers
- ➔ Interest and dividend statements (Forms 1099-INT, 1099-DIV)
- ➔ Information for all other income (Pensions Form 1099-R, Social Security Statement Form 1099-SSA, Sale of stocks & bonds Form 1099-B)
- ➔ Documents for medical deductions, property taxes paid, mortgage interest, auto registration, charity contributions – **all added up** for each category.
- ➔ Form 1098-T from educational institution to claim education credits. Detailed list of additional educational expenses (e.g. books or supplies **REQUIRED** for ATTENDANCE)
- ➔ Amount paid to day care provider, their tax ID number, name, and address
- ➔ **Form 1095-A, Health Insurance Marketplace Statement** (Obama care health insurance)
- ➔ **Unmasked copies** of income transcripts from IRS and state, in absence of tax forms
- ➔ For married filing joint returns, both Taxpayer and Spouse **must be present to sign the tax returns** before it is electronically filed.

Will NOT prepare*

Married Filing Separate Returns

Small business with losses and other Out of Scope items (contact a site for more details)

1099-R, Box 7 with codes: 5, 8, 9, A, E, J, K, N, P, R, T & U

1099 C: If filed for bankruptcy or Non-Personal credit cards

Complicated and advanced Capital Gains/Losses; without Basis reported

Schedule E (rental Property) or Sale of Rental Property

Non-Cash donations of over \$500

*** This is NOT an all-inclusive list. Please consult a VITA volunteer for a complete list of Out-Of-Scope items**