



Items to bring to the VITA Site to have your tax return prepared

Income limit is \$50,000

- ❖ **Valid Photo Identification of taxpayer (and spouse if status is married filing jointly). Photo IDs may be obtained from the DMV.**
- ❖ **To file taxes electronically on a married-filing-joint return, both spouses must be present to sign the required forms**
- ❖ **Social Security card/ITIN for yourself, spouse and dependents (if they have no SS or ITIN card advise them to go to the Social Security Administration office to obtain verification letter).**
- ❖ **Birth dates for taxpayer, spouse and all dependents**
- ❖ **Income Statements(s): W-2, W-2G, 1099R, 1099G, and 1099 MISC from all employers, retirement distributions, and unemployment**
- ❖ **Interest dividend statements: Form(s) 1099 INT and 1099 DIV**
- ❖ **Pension and social security statements: Form(s) 1099R and SSA-1099**
- ❖ **Day care expenses paid with provider's name, address and tax ID#**
- ❖ **Did you make any energy efficient improvements to your home? Bring receipts for approved improvements**
- ❖ **Student loan interest payments: Form(s) 1098E**
- ❖ **If you itemize deductions bring home mortgage interest, real estate taxes paid, medical expenses, and charitable contributions.**
- ❖ **Education expenses for yourself and/or dependent(s): Form(s) 1098T from schools attending**
- ❖ **A copy of last year's federal and state tax returns if available**
- ❖ **Banking Routing Number and Account Number for Direct Deposit (We need to use information from check not deposit ticket)**