

VITA items to bring when having your taxes prepared

Income limit is \$55,000

- * Valid Government issued Photo ID of taxpayer (and spouse if filing joint)
(your local DMV can issue a Photo ID if needed)
- * If married-filing-joint both spouses must be present to sign
(even when filing electronically)
- * Social Security card/ITIN for yourself, spouse and dependents
(if no card social security can provide a verification letter for you to bring)
- * Birth dates for taxpayer, spouse, and all dependents
- * Copies of last year's Federal and State tax return filings
- * Income Statement(s): W-2, W-2G, 1099R, 1099G, 1099MISC, 1099-SA
This is any type of income to include social security statements,
cancellation of debt, unemployment, retirements/pension,
unemployment, interest & dividend income, stock sales,
and any other world wide income
- * Day Care expenses paid with provider's name, address, and tax ID#
- * Health Savings account distributions and account statement
- * Student loan interest payment (form 1098E)
- * Education expenses for yourself and/or dependent(s)
student account statement from college and 1098T
- * Health care Marketplace statement 1099A if you utilize healthcare from
the Marketplace
- * If you itemize deductions bring all your documents to include mortgage
interest, real estate taxes paid, personal property taxes paid,
out of pocket medical expenses (including dental, eye, prescriptions),
charitable contributions
- * Banking routing number and account number for direct deposit
If checking account we need to have information from a check not
a deposit slip