

VITA TAX PREPARATION CHECKLIST

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 (or a copy) for you, your spouse and dependents that you are claiming.
- 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.
- Birth dates for you, your spouse and dependents.
- Wage and earning statement(s) from all employers, (Form W-2, W-2G, 1099-R, 1099-Misc, 1099-K).
- 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 (Forms 1099-INT, 1099-DIV).
- Bank routing numbers and account numbers for direct deposit.
- To file taxes electronically on a married-filing-joint tax return, both spouses must be present to sign the required forms.

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, you will need to also file a Schedule C. Bring business mileage.
- Health Coverage Statements: Forms 1095-A, B, and/or C.
- Any letters received from the IRS.
- 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).
- Mortgage interest (Form 1098), property taxes, charitable contributions.
- Vehicle registration (form that you carry in your car).
- Student loan interest, education expenses.
- Out of pocket medical payments, includes Medical, Dental, Vision, Hospital and Pharmacy.
- Mileage to and from medical appointments.
- Proof of foreign status, if applying for an ITIN.



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