

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.

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, Pharmacy.
- Mileage to and from medical appointments.



UnitedWayQC.org/VITA

852 Middle Road, Suite 401 | Bettendorf, IA 52722 | 563.355.4310

