

VITA TAX ASSISTANCE CHECKLIST

» Who's eligible?

Free tax assistance is available to Scott (IA) and Rock Island (IL) county residents who:

- Have a **low-to-moderate income** (generally \$67,000 and below)
 - Have **no rental property** or farm income
 - Have a **picture ID** (including spouse, if married)
 - Have **Social Security Card(s)** or statement from Social Security Office for **all** listed on return
 - Have a **Form 1095-A** (Health Insurance Statement, if applicable)
 - Have an **Identity Protection IP PIN** (if applicable)
 - Have a copy of **previous year's tax** return (if applicable)
 - Have a **Schedule C** (for self-employment, expenses \$35,000 or less, and no net loss)
 - Are **not military**
- *Residents wanting to file out-of-state returns (other than IA or IL) are not eligible.*

» What should I bring?

Please bring the following items to your tax appointment. As a reminder, you'll need to remain in-person while your taxes are prepared. **If filing a joint return, your spouse needs to be present.** This process can range from 45 minutes to a few hours depending on the complexity of the tax return and how busy the site is.

Required documents

- You must have a valid email, and valid, working phone number with voicemail set up
- Photo ID for you and your spouse
- Social Security card or ITIN for you and every member of your household
- Birth dates for you and every member of your household
- Copy of last year's tax return
- Bank routing number and account number for direct deposit

Income

- Wages (W-2)
- Interest and dividends from checking and savings accounts (Form 1099-INT, 1099-DIV or bank statement)
- Unemployment compensation (Form 1099-G)
- Retirement account transactions (Form 1099-R, Form SSA-1099, Form RRB-1099)
- Gambling earnings (Form W-2G)
- Stock transactions with basis reported (Form 1099-B)
- Self-employment
 - 1099-NEC or gross receipts from work
 - Business expenses: supplies, advertisement, etc.
 - Vehicle information (if deducting mileage): year vehicle was placed in service, total business miles, total commuting miles, total personal miles

Additional suggested items

- Mortgage interest (Form 1098), property taxes
- Health coverage statement (Form 1095-A, B, and/or C)
- Out-of-pocket medical payments includes dental, vision, hospital, pharmacy, mileage
- Child care expenses (provider's name, address, SSN or Employer Tax ID)
- Student loan interest, education expenses (1098-E, 1098-T, receipts)
- Educator expenses for K-12 (receipts)
- Charitable contributions

UnitedWayQC.org/VITA

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