

VITA Checklist

The Volunteer Income Tax Assistance (VITA) program offers free tax help to low- to moderate-income households. IRS-certified volunteers provide free basic income tax return preparation with electronic filing to qualified individuals.

In order for us to assist you, please be sure you have the following:

Identification:

- Valid picture ID such as a drivers' license/state identification for all tax payers.
- Copy of your prior year tax return.
- Social Security cards or ITIN letters for yourself, spouse, your children and other dependents.
- Birth dates for you, spouse, children and other dependents (birth certificates are not required)

Income documentation including:

- W-2s, W-2G
- 1099- Misc. from all employers
- 1099 from financial institution showing Interest, dividends and any stock sales.
- 1099-R forms if retired
- 1099-SSA from the Social Security Administration

Also, if any of the following apply to you, take documentation with you:

- Child care expenses, including the provider's address and Federal ID #
- Mortgage company statements
- Adoption expenses
- Alimony paid or received
- Documentation for the purchase of a home
- Any notices received from the IRS or state tax office
- Property tax bills
- College tuition and student loan interest statements
- Additional forms of income such as:
 - Prizes and awards
 - Scholarships and fellowships
 - Lottery / gambling winnings

For direct deposit of your refund:

- A cancelled blank check (if you don't have a checking account, contact your bank and obtain the American Bankers association (ABA) nine-digit routing number, along with your account number.

If you lost or do not have any or all of these items, you can still get your taxes prepared. Call the IRS helpline at 1-800-829-1040 to find out what you need to do and how to obtain replacement documents.