

VITA Checklist

The Volunteer Income Tax Assistance (VITA) program offers free tax help to people who generally make \$54,000 or less. 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-S from the Social Security Administration

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.

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

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.