

## What to Bring to Your Local VITA Site Checklist

- \_\_\_ Proof of identification (photo ID)
- \_\_\_ Social Security cards for you, your spouse and dependents
- \_\_\_ 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
- \_\_\_ Proof of foreign status, if applying for an ITIN
- \_\_\_ Birth dates for you, your spouse and dependents on the tax return
- \_\_\_ Wage and earning statements (Form W-2, W-2G, 1099-R, 1099-Misc) from all employers
- \_\_\_ Interest and dividend statements from banks (Forms 1099)
- \_\_\_ All Forms 1095, Health Insurance Statements
- \_\_\_ Health Insurance Exemption Certificate, if received
- \_\_\_ A copy of last year's federal and state returns, if available
- \_\_\_ Proof of bank account routing and account numbers for direct deposit such as a blank check
- \_\_\_ To file taxes electronically on a married-filing-joint tax return, both spouses must be present to sign the required forms
- \_\_\_ Total paid for daycare provider and the daycare provider's tax identifying number such as their Social Security number or business Employer Identification Number
- \_\_\_ Forms 1095-A, B or C, Affordable Health Care Statements
- \_\_\_ Copies of income transcripts from IRS and state, if applicable