What to Bring to Your Local VITA Site?

- Social Security Cards or ITIN and Birth dates for **EVERYONE** on the tax return
- **Proof of photo identification** for both Taxpayer and Spouse (if applicable)
- **Copy of prior year tax return**
- Proof of **Bank Account and Routing number** for Direct Deposit/Debit
- Proof of foreign status, if applying for an ITIN
- Wage and earning statements (Form W-2, W-2G, 1099-R, SSA-1099, 1099-Misc, 1099-NEC) from all employers
- Interest and dividend statements (Forms 1099-INT, 1099-DIV)
- Information for all other income (Pensions Form 1099-R, Social Security Statement Form 1099-SSA, Sale of stocks & bonds Form 1099-B)
- Documents for medical deductions, property taxes paid, mortgage interest, auto registration, charity contributions – **all added up** individually.
- Form 1098-T from educational institution to claim education credits
- Amount paid to day care provider, their tax ID number, name, and address
- **Form 1095-A, Health Insurance Marketplace Statement**
- **Unmasked copies** of income transcripts from IRS and state, if applicable
- For married filing joint returns, both **Taxpayer and Spouse** must be present to sign the tax returns before it is electronically filed.

**Will NOT prepare***:

- Married Filing Separate Returns
- Small business with losses and other Out of Scope items (contact a site for more details)
- 1099-R, Box 7 with codes: 5,6,8,9,A,E,J,K,N,P,R,T,U & W
- 1099 C: If filed for bankruptcy
- Complicated and advanced Capital Gains/Losses
- Sale of Rental Property
- Non-Cash donations of over $500

*This is NOT an all-inclusive list. Please consult a VITA volunteer for a complete list of Out-Of-Scope items*