

# TAX PREPARATION CHECKLIST

These are the most commonly-used resources you'll need to successfully complete your taxes with any filing method. Please bring them with you to your VITA tax appointment.



Please note, you MUST have a valid, working phone number with voicemail set up.

- Government issued photo ID for you and your spouse (cannot be expired).
- Social Security cards (or a copy) for you, your spouse and dependents that you are claiming. If filing, "Married-Filing-Separate", you must have spouse's name, social security number, and date of birth to electronically file federal and state returns. 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.
- Identity Protect Pin 6 digit number.
- All forms of income received. Examples (Form W-2, W-2G, 1099-R, 1099-Misc, 1099-K, 1099-NEC, Social Security statement, 1099-INT, 1099-DIV).
- A copy of last year's federal and state returns OR copies of income transcripts (if you don't have the previous years' return) from the IRS and state.
- Bank routing numbers and account numbers for direct deposit.
- To file taxes electronically on a "Married-Filing-Joint" tax return, both spouses must be present to sign the required forms.
- If you are self-employed, you will need to also file a Schedule C. Bring business mileage.
- Health Coverage Statements: Forms 1095-A, B, and/or C.
- Any letters received from the IRS.
- Total paid for day care provider and the day care provider's tax identifying number (the provider's Social Security number or the provider's business Employer Identification Number).
- Mortgage interest (Form 1098), property taxes.
- Charitable contributions.
- Student loan interest, education expenses.
- Out of pocket medical payments, includes Medical, Dental, Vision, Hospital and Pharmacy.

Schedule online at [uwlanc.org/vita](http://uwlanc.org/vita)

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