

What to Bring to a VITA Tax Appointment

Please bring the following documents to complete your tax return. Failure to bring all documents to your appointment may delay completion of your tax return.

1. Photo ID for taxpayer (and spouse, if applicable).
2. Original Social Security card for all persons to be listed on tax return, or an ITIN card for those without Social Security card.
3. Birth dates of all persons listed on tax return.
4. All wage and earnings statements, for example: W-2 Forms, Social Security Income (SSI), Pensions, Annuities, Unemployment Compensation, etc.
5. Any interest and dividend statements (any Form 1099s).
6. Copy of last year's federal and state tax returns (if available).
7. Child care provider's name, Federal ID or Social Security Number, and address. Also, provide the amount paid for child care.
8. If you are itemizing your deductions, please bring a summary listing of your deductions and supporting details/receipts.
9. If you are taking college courses to further your education for a job, and you paid the tuition, please bring the tuition receipt and any financial aid or student loan statements.
10. If you want to have your refund deposited into your checking or savings account, bring your account details (a voided check meets this requirement).
11. Forms 1095-A, Health Insurance Statement, if you had coverage through the Marketplace or HealthCare.gov.