What to bring when you visit a VITA/TCE or AARP Tax-Aide site

IMPORTANT – You MUST have a photo ID for yourself and your spouse, and original Social Security Cards or ITIN letters for yourself, your spouse, and any dependents you will be claiming on your return. Due to new guidelines of the VITA/TCE program, VITA/TCE sites are not allowed to use memorized numbers, or numbers off of other tax documents; including prior year tax returns, even if you had your tax return prepared at the same site in previous years. Photocopies and photos are accepted at most sites.

Checklist of items to bring:

- ☐ **Proof of Identification.** This must be a photo ID.
- ☐ **Social Security Cards or ITIN numbers** for yourself, your spouse, and any dependents you will be claiming this year.
- ☐ **Your spouse**, if you are filing a married filing joint return. ***Both spouses must be present to sign the required forms.***
- ☐ **Birth dates** for you, your spouse, and any dependents on your return.
- ☐ **Last year's tax returns**, both State and Federal, if you have them.
- ☐ **Bank routing numbers and account numbers** if you want to direct-deposit your return (a check will have this information on it).
- ☐ All **wage and earnings statements** for both you and your spouse (if you are filing jointly), from all employers and banks. This includes forms W-2, W-2G, and all forms 1099 (for example SSA-1099, 1099-MISC, 1099-R, etc.). If you are unsure whether or not a form you have is needed, bring it with you just in case.
- ☐ The amount of any **tip income or alimony received.**
- ☐ Any **alimony paid, and the recipient's Social Security Number.**
- ☐ Information on the sale of any **stocks, bonds, or mutual funds** (generally reported on form 1099-B).
- ☐ The total amount you have paid for **day care, and the day care provider's tax identifying number** (the provider's Social Security Number, or their business Employer Identification Number).
- ☐ **Educational expenses** (including forms 1098-E and 1098-T).
- ☐ Qualified **educator expenses** paid by teachers.
- ☐ Amount of any **IRA contributions.**

What to bring when you visit a VITA/TCE or AARP Tax-Aide site

- ☐ If you received a **first-time homebuyer's credit** in a previous year, bring information on the purchase date and the amount of credit you received.
- ☐ Information on any **foreclosure** or other **debt forgiveness.**
- ☐ Receipts for any **qualified energy-efficient home items purchased** (such as windows, furnaces, insulation, etc.).

If you believe you may be able to itemize deductions this year, bring any supporting documentation for expenses that can be itemized. These include:

- ☐ **Home mortgage interest** (generally reported on Form 1098).
- ☐ **Property taxes** (may be included on Form 1098) and any other real estate taxes.
- ☐ **Automobile registrations.**
- ☐ Paperwork showing the **amounts donated to qualified charitable organizations** (such as donations to your church, or donations taken to the Salvation Army).
- ☐ Receipts for any **medical or dental expenses** you paid that were not reimbursed by your health insurance. This includes premiums for medical and dental insurance that are paid by you (amounts paid by your employer do not qualify).
- ☐ **Unreimbursed employee expenses** (such as union dues, or required safety equipment that your employer does not pay for).
- ☐ Documentation for any **gambling losses** (up the amount of gambling winnings received).
- ☐ If you itemized last year (that is, your return included a Schedule A), you will need to bring the **amount of state tax refund you received last year**. Generally, this is reported on a form 1099-G that you should have received.