

Tax Preparation Checklist

Items you need to bring to the Volunteer Income Tax Assistance (VITA) site to have your tax returns prepared. Please bring these items for *all* the individuals—your spouse and dependents—who will be on your tax return.

- Proof of identification, such as photo ID.
- Social Security Cards for you, your spouse and dependents and/or a Social Security Number verification letter issued by the Social Security Administration.
- Birth dates to be listed on the tax return.
- If you are married and filing a joint tax return, to file taxes electronically both spouses must be present to sign the required forms.
- Wage and earnings statement(s) such as W-2, W-2G (gambling income), 1099-R from all employers for all jobs during the past year.
- Proof of Social Security or Social Security Disability Income.
- Interest and dividend statements from banks (Forms 1099).
- A copy of last year's Federal and State returns, if available.
- Bank routing number and checking or savings account numbers for direct deposit of your tax return. These numbers can be found on your checks.
- Proof of 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).
- Rent receipts with name, address, and zip code of landlord, or proof of taxable value of home and amount of property taxes paid the previous year.

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