

## What do I need to bring with me on my visit with VITA?

Use this check list to save time by getting organized before you come in!  
www.vitasa.org

You	Spouse	Dependents	<b>Basic Info</b>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Social Security Cards or ITIN Letters for everyone on the tax return
<input type="checkbox"/>	<input type="checkbox"/>		Your photo ID
<input type="checkbox"/>			Bank information (routing and account numbers for direct deposit)
<input type="checkbox"/>			Last year's tax return (if you have it)
You	Spouse	Dependents	<b>Documents Received</b>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Form W-2s-Wage and Tax Statement
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Form 1099s-Interest Income (1099-INT), Unemployment Compensation (1099-G), Miscellaneous Income (1099-Misc), Dividend Income (1099-Div), Retirement Plan Distribution (1099-R) & Cancellation of Debt (Form 1099-C)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Form 1098-T-Tuition Statement
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Form 1098-E- Student Loan Interest Statement
<input type="checkbox"/>	<input type="checkbox"/>		Form 1099-SSA-Social Security Benefit Statement
<input type="checkbox"/>	<input type="checkbox"/>		<b>FOR HOMEOWNERS:</b> Form 1098-Mortgage Interest Statement
<input type="checkbox"/>	<input type="checkbox"/>		<b>FOR HOMEOWNERS:</b> Receipt Showing real estate taxes paid
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Form W-2G-Certain Gambling Winnings
You	Spouse	Dependents	<b>Personal Records</b>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Child and dependents care expenses
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Education expenses
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Medical expenses
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Charitable expenses
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Retirement expenses
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<b>FOR HOMEOWNERS:</b> Receipts for energy saving improvements on your home
You	Spouse	Dependents	<b>If You Are Self-Employed</b>
<input type="checkbox"/>	<input type="checkbox"/>		Record of business expenses
<input type="checkbox"/>	<input type="checkbox"/>		Record of business income
<input type="checkbox"/>	<input type="checkbox"/>		Forms 1099-MISC

