

Documents needed for VITA

- Current, government issued ID for you and your spouse
- Original Social Security cards for you, your spouse and dependents or a Social Security number verification letter issued by the Social Security Administration
- 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
- Proof of foreign status, if applying for an ITIN
- Birth dates for you, your spouse and dependents on the tax return
- Wage and earning statements (Form W-2, W-2G, 1099-R, 1099-Misc) from all employers, to include: unemployment compensations, Social Security Benefits, Business Income, Alimony, IRA distributions, pensions and annuities, gambling winnings, and any other income information
- Interest and dividend statements from banks (Forms 1099) paid to you by financial institutions. This is usually reported in forms 1099-INT and 1099-DIV
- A copy of last year's federal and state returns, if available
- Routing and account numbers from your financial institution, if your refund will be directly deposited
- To file taxes electronically on a married-filing-joint tax return, both spouses must be present to sign the required forms
- Receipts for child care provider and the child care provider's tax identifying number such as their Social Security number or business Employer Identification Number
- Forms 1095-A, B or C, Affordable Health Care Statements
- Copies of income transcripts from IRS and state, if applicable
- Marketplace healthcare exemption forms
- Tuition/Education Expenses-Usually reported on Form 1098-T. Textbook expenses are not permitted
- Student interest payments
- Mortgage interest and proof of property tax payments (if you own a home)*
- Medical expense receipts*
- Gambling losses only if you are reporting gambling winnings*
- Unreimbursed employee expenses*

** Included on tax return only when you qualify to itemize deductions on Schedule A. For more information, please ask your tax preparer.*