

VITA Checklist

Volunteer Income Tax Assistance Program

Please check off the items on this list and have them in the order below. Bringing this form with your documents will expedite the completion of your return. Items in bold are required. All other items are required if they apply to you.

If you have lost or do not have all of the documentation, call the IRS helpline at 1-800-829-1040 to find out how to obtain replacement documents. *If you do not have all required documentation before or during your appointment, you will be required to reschedule. Please dial 2-1-1 or 1-800 -650-4357 to make a new appointment.

New this year: Any forms you received from the government or insurance marketplace associated with the Affordable Care Act (also known as Obama Care.)

Proof of identification or government issued photo I.D. (You must bring yours and your spouse's if filing jointly.)

Social Security Cards for you, or spouse and dependents and/or a social security number verification letter issued by the Social Security Administration. We will only accept proof of social security numbers issued directly from the Social Security Administration, no exceptions! We will also accept Social Security Administration income statements or Medicare cards with letter 'A' after the Social Security number. Wage and earnings statements from all employers (pay stubs are not accepted) W2s

W2G

1099R

Social Security Statement for recipient SSA-1099 verification letter

Railroad retirement forms

Correct birthdates for you, your spouse and dependents included on the return Copy of 2013 federal and state tax returns (returning clients -bring last year's packet)

Interest and dividend statements from banks (form 1099)

Bank routing numbers and account numbers ONLY IF YOU WANT DIRECT DEPOSIT (this information is found on the bottom of your check or deposit slip; please bring along for verification) Paper filing is limited to special cases.

Any notices from the IRS or state tax office

Legal separation or divorce papers (If you have dependents, and were divorced after 2009, you are required by the IRS to have your ex-spouse sign Form 8332 allowing you to claim the dependents on your return. Form 8332 can be found on the IRS website, or at the IRS office

Custody agreement (if there are exceptions for claiming dependents)

Alimony paid or received (if you paid alimony, you must supply the SSN of the recipient)

Receipts for any charitable contributions

Child care expenses receipt/letter: If you paid for child care expenses and would like to see if you are eligible for an additional tax credit, you will need to bring a letter from the child care provider including the following information: Provider's name, address, federal ID number, and total amount paid during the tax year. If multiple children attend the same child care facility, expenses need to be separate for each child. College tuition and student loan interest statements (form 1098E, 1098T) Mortgage company statements (form 1098) Paid property tax bills
 Additional forms of income such as: Union Dues Lottery/gambling winnings Prizes and awards
 Scholarships and fellowships

Additional information/special notices

STATUS

If you were legally married on December 31, 2014 or before, you must file Married Filing Jointly or Married Filing Separately unless you qualify for head of household or qualifying widow(er)

Married Filing Jointly – if filing with VITA at the library and filing electronically, even if only one spouse is present at the appointment you must have Social Security cards and photo ID of both spouses.

Married Filing Jointly at any other location, you must have SS cards, photo IDs and both must be present to sign

Married Filing Separately you MUST have your spouse's correct social security number

Married Filing Separately you must know if your spouse is itemizing their deductions

Custodial parent must provide the noncustodial parent wanting to claim the child with Form 8332

City taxes can only be completed at the library site or the county treasurer's office

The IRS helpline can assist if you have questions regarding filing status, documentation, claiming dependents, etc. 1-800-829-1040

Free Tax Preparation is a volunteer program. We reserve the right refuse assisting with any tax return which is out of the scope of our program. We will not prepare any return which we believe to be falsified information.