



Please Drop off the following documents with your Intake/Interview Sheet (13614-C) and VITA Demographic form:

- A copy of last year's federal and state tax returns
- Photo ID or proof of identification
- Social security cards for you, your spouse and dependents (An Individual Taxpayer Identification Number assignment letter may be substituted if social security numbers are not available)
- Birth dates for you, your spouse and dependents
- Wage and earning statements (Form W-2, W-2G, 1099-R, 1099-Misc, 1099-NEC) from all employers
- Interest and dividend statements from banks (Forms 1099)
- Blank check or proof of bank account routing and account numbers for direct deposit
 - (Deposit slips are not acceptable)
- Total paid for daycare provider and the daycare provider's tax identifying number, such as a social security number or Business Employer Identification Number
- Copies of income transcripts from the IRS and state, if applicable
- If you purchased Health Insurance through the Marketplace you MUST bring your 1095-A
- Health Savings Account (HSA) documents (Form 1099-SA, 5498-SA)
- Information for all deductions (including charitable contributions)/credits
- Tuition statement form (1098-T)

Please note that to file taxes electronically on a married-filing-joint tax return, both spouses must be present to sign the required forms.

Please be sure to include a working phone number where messages can be left when we need to reach you.