



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
- A copy of 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)
- 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/preschool services, along with the daycare/preschool provider's tax identifying number (such as a social security number or Business Employer Identification Number)
- 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) and credits
- Tuition statement form (1098-T)

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

Additionally, please include a working phone number where we can leave messages when we need to reach you.

Thank you!