Are you prepared? VITA Appointment Checklist

We want your appointment to be smooth and stress free. Please arrive 15 minutes early and review the checklist below to make sure you have everything needed to complete your return.

- **Bring Required Identification**
  - Government issued photo ID for yourself
  - Photo ID for your spouse, if filing jointly
- **Bring Taxpayer Identification**
  - Social Security cards or official SSA letters for you, your spouse, and all dependents
  - Individual Taxpayer Identification Number (ITIN) documentation, if applicable
- **Bring Income Documents**
  - Bring all income document you received for the tax year, including:
    - Forms W-2 from employers
    - Forms 1099 (1099-NEC, 1099-MISC, 1099-R, 1099-G, 1099-INT, 1099-DIV)
    - Social Security income statements (SSA-1099)
    - Unemployment income statements
- **Bring Health Insurance Information**
  - Forms 1095-A if you have had health insurance through the Marketplace
- **Bring Dependent and Childcare Information**
  - Birth dates for all dependents
  - Childcare provider name, address, and tax ID number
  - Total amount paid for childcare during the year
- **Bring Banking Information**
  - Bank routing and account numbers for direct deposit
- **Bring Prior-Year Tax Information (if available)**
  - A copy of last year's federal and state tax returns
  - IRS or state income transcripts, if applicable
- **Important Reminders**
  - If filing Married Filing Jointly, both spouses must be present to sign the required forms.
  - Missing documents may prevent us from completing your return.
  - Appointments typically take 60-90 minutes, depending on complexity.

Not Sure What to Bring?

If you're unsure whether a document applies to you, bring it anyway or contact us ahead of time at matthew.newberry@uwwf.org