VITA Appointment Checklist

Getting ready for your VITA appointment? Use this checklist to make sure you have the documents and information we may need to complete your return. Please arrive **15 minutes early** with your completed intake form and tax documents.

Before You Arrive

- **Print and complete your VITA intake form** and bring the completed paper form with you.
- Plan to arrive **15 minutes before** your scheduled appointment.

Identification

- Government-issued photo ID for yourself.
- Photo ID for your spouse if filing Married Filing Jointly.

For Everyone on the Tax Return

- Social Security card or official Social Security Administration documentation.
- Dates of birth for all dependents.

Income & Tax Documents

- All W-2s, 1099s, Social Security statements, and other income documents you received for the tax year.
- Form 1095-A if anyone on the return had health insurance through the Marketplace.
- Any IRS or state tax notices or transcripts that may apply to your return.

Dependents & Childcare - If Applicable

- Childcare provider name, address, and tax ID number.
- Total amount paid for childcare during the tax year.

Banking & Prior-Year Information

- Bank routing and account numbers if you want your refund sent by direct deposit.
- A copy of last year's federal and state tax returns, if available.

IMPORTANT REMINDERS

Filing Married Filing Jointly? Both spouses must be present at the appointment to sign the required forms.

Bring everything. Missing documents may prevent us from completing your return.

Appointment length: Appointments are approximately 60 minutes.

Not sure whether a document applies to you?

Bring it with you. It is better to have an extra document available than to be unable to complete your return because something is missing.