

TAX DOCUMENT CHECKLIST

(revised January 2013)

The VITA program is generally for taxpayers with incomes up to about \$50,000

Documents required to have your tax return prepared:

- **A copy of your last year's federal and state tax returns.**
- **Social Security Cards or Individual Taxpayer Identification cards (ITIN) for each person listed on the return.** Must know exact birthdates for all dependents. If filing jointly, spouse must be present to file electronically.
- **Filer's valid driver's license or photo ID**
- If you are separated or divorced and the non-custodial parent claiming an exemption for a child, a Form 8332 signed by the custodial parent or other allowable documentation. We recommend you call the appointment number for a contact phone number so we can review your documentation needs before you come in.
- **W-2's** each job held during the year, **Social Security benefits statement (SSA-1099)** and **1099-Rs** for pension, annuity and IRA withdrawals. Also, tip income records.
- For **1099-MISC**, bring in any unreimbursed expenses incurred for this employment (mileage log, supplies, tools, etc.). Same for small, sole proprietor businesses.
- Documents for other income: such as **unemployment (1099-G)**, **gambling winnings (W-2G)**, **interest (1099-INT)** and **dividends (1099-DIV)** that you or anyone in your family received.
- For investments, all tax information received from broker (**1099-B**) including any supplemental information provided
- For oil and gas royalties, bring in all paperwork received as we need expenses associated with production and **Colorado DR-0021Ws** and tax booklet if Colorado royalties.
- If you began receiving **PERA (1099-R)** in 2012, bring in your last pay check stub.
- If you want a refund directly deposited into your bank account, you must bring your checkbook or a savings account deposit slip for the routing number and account numbers.

If you are paying a mortgage and/or itemizing deductions, bring in:

- Mortgage interest paid (**form 1098**)
- Real estate taxes paid
- Charitable donations of cash and property with check records and charity acknowledgements
- Medical insurance premiums and medical expenses **you paid out of pocket.**
- Car registration for personal property tax
- Gambling losses if you have gambling winnings to offset

Other possible deductions or credits:

- **Child care** – If you paid someone to watch your kids or grandkids so you could work, bring in the Providers name, SSN or EIN and how much you spent for each child.
- **Education credits** – bring in your Form 1098-T and records of expenses tuition, fees and course materials. Also bring in details of scholarships received.
- **Energy credits** – bring in amount paid for materials and labor and manufacturer's certificates.
- The first time homebuyer's credit has expired