

TAX DOCUMENT CHECKLIST

The VITA program is generally for taxpayers with incomes up to about \$54,000

Documents required in order to file tax returns with the Durango – La Plata VITA program:

- **A copy of your last year's federal and state tax returns!**
- **Social Security Cards** or **Individual Taxpayer Identification cards (ITIN)** or an original form or letter from the Social Security Administration for each person listed on the return. Copies are accepted. Must have exact birthdates for all dependents..
- **Valid driver's license or government issued photo ID for taxpayer and spouse.**
- 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. *Let us know this when you make your appointment so can review your documentation before you come in.*
- **W-2's** or **1099-MISC** for each job held during the year. For 1099-MISC bring in any unreimbursed expenses incurred for this employment (mileage log, supplies, tools, etc.)
- **1099-Rs** for pensions and annuity income. **SSA-1099** Statements for Social Security benefits.
- Statements for other income: such as unemployment (**1099-G**), gambling winnings (**W2G**), interest (**1099-INT**) and dividends (**1099-DIV**), you or anyone to be included on the return received.
- For investments, **1099-B** from your broker including any supplemental information provided.
- For oil and gas royalties, bring in all paperwork received as we need expenses associated with production. For **Colorado royalties**, bring **DR-0021Ws** and **Severance Tax** booklet.
- If you began receiving PERA (1099-R) in 2016, bring in your last pay check stub.
- If filing jointly, spouse must be present to file electronically
- 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 and account numbers.

Affordable Care Act (aka Obamacare):

- You must know if you had **Minimum Essential Coverage (MEC)** in 2016 for all persons to be listed on the return. You had **MEC** if you had Medicare, Medicaid, an employer sponsored health insurance or insurance purchased through the Marketplace exchange.
- Months in 2016 that you had **Minimum Essential Coverage** for all persons on the return.
- If your insurance is from the Marketplace, Form **1095-A**. Employer, Form **1095-B**, **1095-C**.

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

- Mortgage interest paid (**form 1098**)
- Real estate taxes paid
- Medical insurance premiums, including Long Term Care, and expenses paid out of pocket.
- Charitable donations of cash and property with check records and charity acknowledgements
- 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 expenses for course materials not included in your 1098-T. Also bring in details of scholarships received.