

Volunteer Income Tax Assistance (VITA) Tax Document Checklist



Social Security Cards for (must be original; no copies will be accepted):

- Primary taxpayer
- Spouse
- ALL dependents

Photo ID for (must be original; no copies will be accepted):

- Primary taxpayer
- Spouse

Date of birth for:

- Primary taxpayer
- Spouse
- ALL dependents

Income Documents

- Wages (Form W-2)
- Self-employment/miscellaneous income (Form 1099-MISC)
- Unemployment compensation (Form 1099-G)
- Social security benefits (Form 1099-SSA)
- SSI statement for all SSI received in tax year (if you have not received a statement, one can be obtained from the Social Security office)
- Pension (Form 1099-R)
- Interest and dividends (Form 1099-INT and/or Form 1099-DIV)
- Gambling winnings (Form W-2G)
- DHS cash assistance
- Other information relevant to income

Proof of Expenses

- Medical or HMO Premiums paid for self and/or dependents
- Proof of health insurance coverage (Form 1095-A, 1095-B, and/or 1095-C)
- Total amount paid for daycare and the daycare provider's tax identification number
- Student loan Interest (Form 1098-E), tuition (Form 1098-T), and course material receipts
- Total amount of residential heating costs paid 11/01/18 – 10/31/19 (can be found on most recent Consumers Energy bill)

Homeowners

- Summer and Winter property tax bills from the tax year

Renters

- Amount of rent paid monthly during tax year
- Landlord's name, address, and zip code for tax year
- For direct deposit: financial institution name, routing number, and account number
- Copy of your most recent federal, state, and local tax returns

Failure to bring all documents can result in a delay or rescheduling of your tax appointment.