



What to Bring to a VITA/ TCE/Tax-Aide Site

Items you need to bring to have your tax returns prepared:

- Proof of identification – Picture ID
- Social Security Cards for you, your spouse and dependents or a Social Security Number verification letter issued by the Social Security Administration OR Individual Taxpayer Identification Number (ITIN) assignment letter for you, your spouse and dependents
- Proof of foreign status, if applying for an ITIN
- Birth dates for you, your spouse and dependents on the tax return
- Wage and earning statement(s) Form W-2, W-2G, 1099-R, 1099-Misc from all employers
- Interest and dividend statements from banks (Forms 1099)
- A copy of last year's federal and state returns if available
- Proof of bank account routing numbers and account numbers for Direct Deposit, such as a blank check
- Total paid for daycare provider and the daycare provider's tax identifying number (the provider's Social Security Number or the provider's business Employer Identification Number) if appropriate
- To file taxes electronically on a married-filing-joint tax return, both spouses must be present to sign the required forms.
- If you received health insurance through the Marketplace this year, bring the Health Insurance Marketplace Statement—Form 1095-A—you received from the Marketplace.
- If you didn't have health insurance this year, but qualify for a coverage exemption from a Health Insurance Marketplace, bring the "exemption certificate number" you received from the Marketplace. For more information, go to www.healthcare.gov/fees-exemptions-from-the-fee