



VITA CHECKLIST

What to Bring to Your Local VITA or TCE Site

Bring only the documents that apply to you!

	Proof of identification (photo ID)
	Social Security cards for you, your spouse and dependents
	An Individual Taxpayer Identification Number (ITIN) assignment letter may be substituted for you, your spouse and your dependents if you do not have a Social Security number
	Proof of foreign status, if applying for an ITIN
	Birth dates for you, your spouse and dependents on the tax return
	Wage and earning statements (Form W-2, W-2G, 1099-R, 1099-Misc or 1099-NEC) from all employers
	Interest and dividend statements from banks (Forms 1099)
	Health Insurance Exemption Certificate, if received
	A copy of last year's federal and state returns, if available
	Proof of bank account routing and account numbers for direct deposit such as a blank check
	To file taxes electronically on a married-filing-joint tax return, both spouses must be present to sign the required forms
	Total paid for daycare provider and the daycare provider's tax identifying number such as their Social Security number or business Employer Identification Number
	Forms 1095-A, B and C, Health Coverage Statements
	Copies of income transcripts from IRS and state, if applicable
Please go to: https://www.irs.gov/individuals/checklist-for-free-tax-return-preparation for further details.	