



Volunteer Income Tax Assistance Program

WHAT TO BRING TO YOUR VITA APPOINTMENT

Tax Preparation Appointment Checklist

- Government issued proof of identification (photo id) for every taxpayer
- Social Security cards for you, your spouse and all dependents
- Birth dates for you, your spouse and dependents on the tax return
- Wage and earning statements (Form W-2, W-2G, 1099R, 1099 Misc)
- Interest and dividend statements from banks or brokerage houses (Form 1099)
- All Forms 1095 A,B or C : Affordable Health Care Statements
- Health Insurance Exemption Certificate (if received)
- Form 1098: Mortgage Interest payment and property tax payment verification
- Copy of last year's federal and state returns, if available
- Proof of bank account routing and account number for direct deposit (blank check)
- Total paid to daycare provider and provider's tax id number (social security number or EIN)

NOTE:

To file electronically on a married-filing –joint tax return BOTH spouses must be present to sign the required form

Remember: If any of the above documents are not brought to the appointment, the appointment will be **rescheduled.**

For VITA questions call Norma Mosqueda at 530-241-7521 ex 101

IT'S YOUR MONEY
GET IT!
Cal EARNED INCOME TAX CREDIT



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United Way
of Northern California