WHATTOBRINGTOYOUR 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
- Intake and Interview Form
- 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 today care 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 MORE INFORMATION PLEASE CONTACT THERESA MCCAUSLAND AT 530-241-7521