

Vita Checklist

Items to bring to your VITA appointment, [per the IRS](#):

- Photo ID
- Social Security cards for you, your spouse and any 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 (Forms W-2, W-2G, 1099-R, 1099-Misc) from all employers
- Interest and dividend statements from banks (Form 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
- 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

To file taxes electronically on a married-filing-joint tax return, both spouses must be present to sign the required forms.