



## Preparing for Your Appointment with VITA

To verify your identity and have signed permission to prepare your taxes, you (and your spouse, if Married Filing Jointly) must be present at your appointment(s).

### Documents Required for the Appointment:

- **Photo identification (for you and your spouse, if filing jointly).** Acceptable documents include a driver's license, state ID, or passport.
- **Social security cards or Individual Taxpayer Identification Number (ITIN) or SSA-1099** for yourself, your spouse, and each person to be claimed on your return.
- **W-2 forms** for all jobs held in 2023.
- **All 1099 forms**, including income received from unemployment (1099-G), social security (1099-SSA), pension payments (1099-R), interest (1099-INT), and dividends (1099-DIV), 1099-NEC or 1099-K for self-employment.

### Bring These if They Apply to You:

- The **routing and account number** for your bank account for direct deposit (found on a check). This will help you to get your refund faster!
- If anyone on your tax return is in **post-secondary education** (college): Record of tuition payments (1098-T), plus receipts for college materials and books. A student account statement from the Financial Aid office can also be helpful.
- If you paid for **childcare**: total expenses and name, address, and tax ID number of provider(s).
- Form 1095 A with **health insurance** information if you received one.
- If you **own your home**: Mortgage interest statement and **property tax receipts**.
- A **copy of last year's tax return** if you have it. Not required, but it can be helpful.
- Anything that says, "This is important for your taxes."
- **W2G** – Gambling Winnings