

What to Bring When You Visit a VITA Site

You must have a photo ID for yourself and your spouse, Social Security cards, SSA-1099 or ITIN letters for yourself, your spouse and any dependents you will be claiming on your return.

Checklist of items to bring:

- Proof of identification for you and your spouse (if filing jointly). This must be a photo ID.
- Social Security cards, SSA-1099 or ITIN letters for yourself, your spouse and any dependents you will be claiming this year.
- Your spouse, if you are filing a married filing a joint return. Both spouses must be present to sign the required forms.
- Birth dates for you, your spouse and any dependents you will be claiming on your return.
- Last year's tax returns, both state and federal, if you have them. If you do not have a copy, you can obtain a transcript at www.irs.gov.
- Bank routing and account numbers if you want to direct-deposit your return. (A check will have this information on it).
- All wage and earnings statements for both you and your spouse (if you are filing jointly), from all employers and banks. Includes forms W-2, W-2G, and all forms 1099 (for example SSA-1099, 1099-MISC, 1099-R, 1099-DIV, 1099-INT, etc.). If you are unsure whether a form you have is needed, bring it with you. If you are missing a W-2, contact the employer for a duplicate before you come in.
- Self-employment income (1099-Misc or Manual Records) if you run a business or perform odd jobs and the associated expenses (Schedule C-EZ only).
- Unemployment income (1099-G). If you received unemployment during the tax year, the state will mail or email you a 1099-G. If you did not receive the 1099-G, obtain your 1099-G online at Department of Workforce Development website or contact the state to obtain it before you come in.
- Amount of any tip income.
- Amount of alimony received and date of divorce agreement.
- Did you sell stocks? You will need to know the gain/loss from sale of stocks (1098-B and/or investment broker's statements). Contact your broker if you do not have this information.
- The total amount you paid for day care, and the day care provider's tax identification number (the provider's Social Security number or their business Employer Identification Number).
- Educational expenses (Forms 1098-E/1098-T and receipts/statement of account for tuition, books, supplies and equipment required for enrollment or attendance) and scholarships/grants received. Bring both your current tax year and prior year 1098-T (if any).
- Alimony paid, recipient's social security number and date of divorce agreement.
- Amount of any IRA contributions.

- Information on debt forgiveness (1099-C, Credit Card Only).
- If you received a First-Time Homebuyer's Credit in a previous year, bring information on the purchase date and the amount of credit you received.
- Receipts for any qualified energy-efficient home items purchased (such as windows, furnaces, insulation, water heaters, etc.) and any prior year energy efficient credits received.
- Property tax receipts for any property taxes paid during the tax year and your tax year property tax bill, even if not paid.
- Closing/settlement statement if home was sold/purchased during the tax year.
- Amount of rent payments made during the tax year.
- Home mortgage interest (generally reported on Form 1098).
- Paperwork showing the amounts donated to qualified charitable organizations (such as church or donations taken to Goodwill).
- Receipts for any medical or dental expenses you paid during the tax year that were not reimbursed by your health insurance. Includes premiums for medical/dental insurance that are paid by you (amounts paid by employer or taken pre-tax on your paycheck do not qualify).
- Health Insurance Marketplace Statement (1095-A).
- Health Savings Accounts Information (5498-SA, 1099-A).
- Documentation for any gambling losses (up to the amount of gambling winnings received) if itemizing on Schedule A.
- If you itemized deductions last year (your return included a Schedule A), you will need to bring the amount of state refund you received last year. This is reported on form 1099-G, which can be obtained online at Wisconsin Department of Revenue website.
- Estimated Federal and State withholding tax payments made.

If you believe you will be eligible for Wisconsin Homestead Credit, bring the following:

- Original and unaltered rent certificate and/or copy of tax year property tax bill.
- Printout of any Wisconsin Works (W-2) Payments Received during the tax year.
- County Relief, Kinship Care, or other cash public assistance received.
- SSA, SSDI, SSI, SSI-E or caretaker supplement received.
- Child support or maintenance payments received.
- If under 62 and you have no W-2 or self-employment income, bring proof of disability statement from either physician or Veteran's/Social Security Administration.