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.