What to Bring When You Visit a VITA Site

<u>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.</u>

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.

☐ 2019 and 2020 tax returns, both state and federal, if you have them. If you do not have a copy, you can obtain a federal 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). Complete Supplemental Self-Employed Intake Form.

☐ Unemployment income (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 for each child 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). Complete Supplemental Education Intake Form.

☐ Alimony paid, recipient's social security number and date of divorce agreement.

☐ Amount of any IRA contributions.

☐ Amount of Economic Impact Payments

☐ Amount of Advanced Child Tax Credit Payments (IRS Letter 6419)

☐ 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(s), 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). Complete Supplemental Health Savings Account Intake Form.

☐ 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.

<u>If you believe you will be eligible for Wisconsin Homestead Credit, bring the following:</u>

☐ 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. Obtain printout from child support agency.

☐ If under 62 and you have no W-2 or self-employment income, bring proof of disability statement/letter from either physician or Veteran's/Social Security Administration which states the date you became disabled.