

Volunteer Income Tax Preparation Required Documentation

The Volunteer Income Tax Assistance (VITA) program offers free tax help to households with annual income at or below \$57,000. IRS-certified volunteers provide free basic income tax return preparation with electronic filing to qualified individuals. For us to best assist you, please make sure you have the following:

Identification:

- Valid picture ID, such as a driver's license/state identification for all taxpayers
- Copy of your prior year tax return
- Social Security cards or ITIN letters for yourself, spouse, your children, and other dependents
- Birth dates for you, spouse, children, and other dependents (birth certificates are not required)

Income documentation including:

- W-2s, W-2G
- 1099- Misc. from all employers
- 1099 from financial institution showing interest, dividends, and any stock sales
- 1099-R forms, if retired
- 1099-S provided by a title company after the sale of real estate
- Stimulus Check Notice 1444-C from IRS*

Also, if any of the following apply to you:

- 1095 A, B, or C Health Coverage Statements
- Childcare expenses, including the provider's address and Federal ID #
- Letter 6419 for Advanced Child Tax Credits*
- Mortgage company statements
- Adoption expenses
- Alimony paid or received
- Documentation for the purchase of a home
- Any notices received from the IRS or state tax office
- Property tax bills
- College tuition and student loan interest statements
- Additional forms of income such as:
 - Prizes and awards
 - Scholarships and fellowships
 - Lottery/gambling winnings

For direct deposit of your refund, provide proof of bank account routing number and account number.

If you do not have any, or all, of these items, call the IRS helpline at 1-800-829-1040 to get further instructions for how to obtain replacement documents. Other questions? Call 812.422.4100.

**NEW required documentation for Tax Year 2021.*