



A couple things to remember when preparing for your appointment:

- ✓ Volunteer Income Tax Assistance Program (VITA) site volunteers are certified and trained through the IRS.
- ✓ Program is free for those with household income of \$50,000 or less.

What type of income can I have?

When you called 2-1-1 we asked about your income, but just to be sure, make sure your source of income is listed below.

If not, please call 2-1-1.

- ✓ W2
- ✓ 1099
- ✓ DHS earning statements
- ✓ Unemployment
- ✓ Social Security
- ✓ Income from a foreign country cannot be processed



What should I bring to my FREE Tax Appointment?

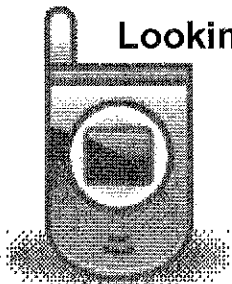
- ✓ Social Security Cards for self, spouse and dependents
- ✓ State-issued Photo Identification (Driver License/State ID Card)
- ✓ All income forms - W-2, 1099, Social Security, DHS, Unemployment Statement, etc.
- ✓ Copy of last year's tax return, if available
- ✓ Receipts for Education expenses
- ✓ Total Rent for 2011 and landlords' names and addresses
- ✓ Total Heat Expenses for 2011 - copy of recent gas/fuel bill
- ✓ Property Tax Statement showing Summer & Winter Taxes
- ✓ Any documentation for itemized deductions (child care, mortgage interest, etc.)
- ✓ Bank routing and account numbers for direct deposit
- ✓ **See detailed checklist on back!**

Questions about your appointment?

Looking for information and referrals for other community resources?

Contact us 24/7

2-1-1 or toll-free (866) 561-2500





Feel free to utilize this checklist for documentation that may be applicable for your tax appointment. Please bring all applicable documents!

Income:

- All W-2 forms for all jobs worked during 2011
- Bank and/or credit union statements (Forms 1099-INT)
- Broker statements (Form 1099-DIV)
- Refunds from state/local government (Form 1099-G)
- Proof of alimony received and divorce decree
- All receipts for any small business operated by you or your spouse (income and expenses)
- Broker statements for selling stock or real-estate (Forms 1099-B or 1099-S)
- Pension or IRA (Form 1099-R)
- Social Security Income (SSA-1099)
- 1099-MISC
- Jury Duty statements
- Gambling winnings (Form W-2G)

Identification:

- Social Security Cards for all members of the household
- Birth Certificates or other proof of birthdays for all on the return
- Photo identification with address, or other proof of address
- Your spouse, if filing jointly

Adjustments/Deductions:

- Proof of alimony paid (divorce decree, signature page, spouse's social security number)
- Statements from contributions to traditional IRA accounts
- Proof of student loan interest paid

- Proof of tuition paid (Form 1098-T)
- Jury Duty (if your employer pays for full day of work, your jury duty pay may be deducted)
- Child Care provider tax id number and total amount paid

Schedule A:

- Receipts/Cancelled checks for out of pocket expenses paid for medical expenses
- Real estate tax receipts
- Receipts/Cancelled checks for license plate renewals from Secretary of State
- Proof of all charitable contributions
- Mortgage Interest (Form 1098)
- Receipts for all work-related expenses for which you didn't receive reimbursement
- Receipts for moving more than 50 miles from former residence for work

Not taxable, but count toward household income:

- Statements from the Veteran's Administration
- Statements from DHS
- Information for Pell Grants received
- Information for Loans received
- Heating Bills from November 2010-October 2011 or Home Heating Credit amount from Gas Company
- Rent Receipts paid in 2011 and landlord's name and address