

What to bring to your BCAC VITA Tax Preparation Appointment

Personal documents

Bring all documents below.

- Photo ID
- Social Security Cards, Social Security Number verification letters, for you, your spouse, and any dependents
- Birthdates for you, your spouse, and dependents on the tax return
- Bank account and routing number or a voided check for direct deposit of your refund

Income

Bring all documents that apply.

Employment Income

- W-2 form(s) for all jobs last year (your employer(s) will have sent you this by January 31st)

Self-Employment Income

- 1099-MISC and/or 1099-K
- Records of income not reported on 1099 forms
- Records of expenses including receipts, credit statements, etc.
- Record of estimated tax payments

Retirement Income

- SSA-1099 form for Social Security benefits
- 1099-R for pension/IRA/annuity income

Other sources of income

- 1099-G for refund of state/local income taxes
- 1098-T for scholarships/fellowships
- 1099-R for disability income
- Income or loss from the sale of stocks, bonds, or real estate
- Income or loss from rental property

Other sources of income (continued)

- Alimony received
- Statements for prizes or lottery/gambling winnings
- Interest and dividend statements from banks
- Records for any other income

Expenses

You may be able to claim tax deductions for some of the expenses you have. Bring documentation for all of the following expenses you have.

- Retirement contributions, including a 401(k) or IRA
- State and local taxes you've paid
- Mortgage statements and property tax bills if you are a homeowner
- College tuition (1098-T) and student loan statements (Form 1098-E)
- Childcare expenses, including provider's address and federal tax ID number
- Receipts for charitable donations
- Medical and dental bills
- Records for supplies used as an educator

Additional Items

- Last year's federal and state tax return if available
- Proof of health insurance or exemption: Form 1095-A if you had coverage through the Health Insurance Marketplace, Form 1095-B/1095-C if you had other kinds of insurance, or a Health Insurance Exemption Certificate, if received
- Tax notices: Documents from the IRS, Health Insurance Marketplace, your state tax agency, or anything that says "IMPORTANT TAX DOCUMENT"

PLEASE NOTE: To file taxes electronically on a married-filing joint tax return, ***both spouses must be present to sign the required forms***