



In Person / Scan appointment

Date _____

Time _____

For all appointments—Please bring the tax forms below :

→ **VOIDED CHECK or information on bank account routing & account number for Direct Deposit** ←

- Proof of identification (photo ID) for you and your spouse ·
- Social Security cards for you, your spouse and all dependents
- Copy of Tax Year 2022's federal and state returns
- To file taxes electronically on a married-filing-joint tax return, both spouses must be present to sign the required forms
- Birth dates for you, your spouse and all dependents on the tax return
- Wage and earning statements (Form W-2, W-2G, 1099-R, RRB-1099-R, CSA-1099, 1099-G, 1099-MISC, 1099-INT, 1099-DIV, 1099-NEC limited) for you and your spouse from all employers
- Social Security income (Form SSA-1099, SSA-1042S, RRB-1099) for you and your spouse
- Interest and dividend statements from banks (FORMS 1099-INT, 1099-DIV, 1099-B limited, 1099-S limited)
- Education Credits (Form 1098-T)
- Gambling Winnings (Form W-2G)
- Health Savings Accounts (Form 1099-SA limited)
- Credits for Sick Leave and Family Leave for Certain Self-Employed Individuals (Form 7202)
- Forms 1095-A, B and C, Health Coverage Statements
- Total paid for daycare provider and the daycare provider's tax identifying number such as their Social Security number or business Employer Identification Number
- Information for other income
- Information for all deductions (including charitable contributions)/credits
- Medical payments (Doctors, Hospital , Dentist, Glasses, Eye Exam, Prescriptions, Medical Miles (RT), +
MORE

Extra forms to bring if you are doing Scan appointment

- *Form 13614-C : Intake/Interview & Quality Review Sheet*
- *Form 14446 : Virtual VITA/TCE Taxpayer Consent Form*
- *- Form 15080 : Consent to Disclose Tax Return Information*
- *- Contact Form of VITA Client*