2015 VITA Checklist
Getting Help to Prepare your Taxes
What to Bring with You

If you need help completing tax forms, a Volunteer Income Tax Assistance (VITA) site near you can help. Call 1-800-906-9887 to find the nearest location. When you go to a VITA site, or if you choose to go to a commercial tax preparer, be ready. Take these items with you:

- Valid picture ID
- Copy of 2013 tax return (if you have it)
- Social Security Cards, Social Security Number verification letters or Individual Taxpayer Identification Number (ITIN) letters for you, your spouse and any children born before December 31, 2014.
- Income documentation including:
  - W-2 Forms from all jobs worked in 2014
  - All 1099 Forms showing other income received in 2014
  - Total 2014 income of anyone you plan to claim as a dependent on your tax return (bring W-2 Forms, if received)
  - A blank check for direct deposit of your refund (If you don’t have a checking account, bring your bank account name, number and the 9-digit American Bankers Association (ABA) routing number. Contact your bank if you need assistance identifying the ABA number.)
- Health insurance documentation:
  - Form 1095-A, if you or anyone on your tax return had coverage through the Health Insurance Marketplace
  - Form 1095-B or 1095-C, if you or someone on your tax return had coverage from another source (Note: sending these forms is optional for 2014, so everyone with insurance will not receive one)
  - A list of who on your tax return had health insurance coverage in 2014 and for which months they were covered (provide this if you didn’t receive Form 1095-B or 1095-C)

If any of the following apply to you, take documentation with you:
- Child care expenses, including the provider’s address and federal tax ID #
- Mortgage company statements
- Adoption expenses
- Alimony paid or received
- Any notices received from the IRS, state tax office, or Health Insurance Marketplace
- 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

If you lost or do not have all of these items, you can still get your taxes prepared. Call the IRS helpline at 1-800-829-1040 to find out what you need to do and how to obtain replacement documents.