

# Tax Preparation Checklist

Items you need to bring to the VITA site to have your tax returns prepared. Please bring these items for *all* the individuals—your spouse and dependents—who will be on your tax return.

- Proof of identification.
- Social Security Cards for you, your spouse and dependents and/or a Social Security Number verification letter issued by the Social Security Administration.
- Birth dates to be listed on the tax return.
- If you are married and filing a joint tax return, to file taxes electronically both spouses must be present to sign the required forms.
- Wage and earnings statement(s) Form 2-3, W-2G, 1099-R from all employers for all jobs during the past year.
- Proof of Social Security or Social Security Disability Income.
- Interest and dividend statements from banks (Forms 1099).
- A copy of last year's Federal and State returns if available.
- Bank Routing Number and Account Number for direct deposit of your tax return. These numbers can be found on your checks.
- Total paid for day care provider and the day care provider's tax identifying number (the provider's Social Security Number or the provider's business Employer Identification Number).
- Rent receipts with name, address, and zip code of landlord, or proof of taxable value of home and amount of property taxes paid the previous year.



The **Earn, Keep, Save MORE** program is sponsored by PHI ([www.PHInational.org](http://www.PHInational.org)). For more information, contact Tameshia Bridges at 517.372.8310 or [tbridges@PHInational.org](mailto:tbridges@PHInational.org).

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