

TO HAVE YOUR TAXES PREPARED, BRING or UPLOAD:

IDENTIFICATION:

- **Social Security Cards** or **ITIN Letters** for EVERYONE who will be included on the return
- **Photo ID** for ALL tax return signers (BOTH spouses must sign if filing jointly)

INCOME:

- **W-2s** for wages, **W-2Gs** for gambling income
- **1099s** for interest, dividends, unemployment, state tax refunds, pension or 401-K distributions, and other income
- **Records** of revenue from self-employment or home-based businesses

EXPENSES:

- **1098s** for mortgage interest, student loan interest (1098-E), or tuition (1098-T), statement of property tax paid
- **Statement of college student account** showing all charges and payments for each student on the return
- **Childcare receipts**, including tax ID, phone number, and address for childcare provider
- **Records** of expenses for self-employment or home-based businesses

Other Documentation:

- **Checking or Savings account information for direct deposit/ direct debit**
- **1095s** showing creditable health insurance coverage

Last year's tax return – **REQUIRED** for MyFreeTaxes self-preparation

PLEASE NOTE: The scope of work that can be done within the VITA site is defined by the IRS. If your return is considered “out of scope” for this site, our VITA Volunteers will not be able to prepare your return.

OUT of SCOPE:

- **CANNOT** prepare the return if reporting **Cryptocurrency**.
- **CANNOT** prepare the return if a **Depreciation schedule** is required or a **Schedule F (Farm)** is required.
- **CANNOT** prepare the return if self-employment or home-based business:
 - Has a net loss
 - Has self-employed, SEP, SIMPLE, or qualified retirement plans
 - Has more than \$35,000 in expenses
 - Has employees
- **CANNOT** prepare a return with **casualty or theft losses**.

SITES May Be Able to Prepare:

- **MAY** be able to prepare a return with **Schedule E (rental income)** or **Schedule K-1 (partnership or trust income)**
- **MAY** be able to prepare a return with income from **dividends, capital gains, or minimal brokerage transactions**.
- **NOT** all sites prepare multiple state returns.

For SNAP (Food Stamp Program) assistance please call the SNAP Outreach hotline at 1-855-444-5556.