

What to Bring to Your VITA Site for tax preparation

- ➔ **Social Security Cards** or **ITIN** and Birth dates for **EVERYONE** on the tax return
- ➔ **Valid photo identification** for both Taxpayer and Spouse (if applicable)
- ➔ **Bank Account and Routing number** for Direct Deposit/Debit (e.g. voided check or Bank phone app but **NOT the Deposit Slip**) **IRS will NOT be mailing checks for refunds starting 2026 tax season.**
- ➔ **Copy of last tax return filed**
- ➔ **Identity Protection PIN** number (IP PIN), if issued for **ANYONE** and/or **EVERYONE** on the tax return.
- ➔ For married filing joint returns, **both Taxpayer and Spouse must be present to sign the tax returns** before it is electronically filed.
- ➔ Proof of foreign status, if applying for an ITIN
- ➔ Wage and earning statements (Form W-2, W-2G, 1099-R, SSA-1099, 1099-Misc, 1099-NEC) from all employers
- ➔ Interest and dividend statements (Forms 1099-INT, 1099-DIV)
- ➔ Information for all other income (Pensions Form 1099-R, Social Security Statement Form 1099-SSA, Sale of stocks & bonds Form 1099-B)
- ➔ If Itemizing deductions: Documents for medical deductions, property taxes paid, mortgage interest, auto registration, charity contributions – **all added up** for each category.
- ➔ Form 1098-T from educational institution to claim education credits. Detailed list of additional educational expenses (e.g. books or supplies **REQUIRED for ATTENDANCE**)
- ➔ Amount paid to day care provider, their tax ID number, Full Name, and Address
- ➔ **Form 1095-A, Health Insurance Marketplace Statement** (Obama care health insurance)
- ➔ **Unmasked copies** of income transcripts from IRS and state, in absence of tax forms

Will NOT prepare*

- ➔ Married Filing Separate Returns
- ➔ Small business with losses and other Out of Scope items (contact a site for more details)
- ➔ 1099-R, Box 7 with codes: 5, 8, 9, A, E, J, K, N, P, R, T & U
- ➔ 1099 C: If filed for bankruptcy or Non-Personal (Business) credit cards
- ➔ Complicated and advanced Capital Gains/Losses; without Basis reported
- ➔ Schedule E (Rental Property - Exception: Active Duty Military members) or Sale of Rental Property
- ➔ Non-Cash donations of over \$500
- ➔ Other State Tax Returns except Arizona (Luke AFB will prepare ALL states for Active Duty Military members)

➔ *** This is NOT an all-inclusive list. Please consult a VITA volunteer for a complete list of Out-Of-Scope items**