

Items to Bring to Your Tax Appointment

We cannot finish your tax return if you do not have the following:

- **Social Security verification for yourself, spouse, and any dependent** who will be claimed on your return. This can be any one of the following:
 - Social Security Card
 - Social Security Benefits Statement (SSA-1099) that includes the person's name and SSN
 - ITIN Card or Letter
 - Medicare (not Medicaid) card if a letter A follows the Social Security Number on the card
- **Photo ID for yourself (and your spouse if you plan to file a joint return).** Please note that a photo ID is in addition to, not in place of, Social Security verification listed above.
- **Any tax documents or records you can provide to verify the information on your return.** Not all will apply to you, but please bring all that do:
 - All forms W-2 and 1099 showing wages you earned
 - If you purchased health insurance through the Healthcare Marketplace, bring forms 1095A.
 - Interest and dividend statements
 - Sales of stocks, bonds or a home
 - Records of business income or expenses if you are self-employed including cash income
 - Records of tips not reported on tax forms
 - Unemployment compensation
 - Social Security benefits statements
 - Distributions from retirement accounts (pensions, annuities and IRAs)
 - Tax forms showing canceled debt on a mortgage or credit card
 - Alimony paid or received
 - Educational Expenses for a college or trade school student
 - Interest paid on student loans
 - Educator expenses you incurred as a K-12 teacher
 - Gifts to charity (Please include separate totals for cash and noncash contributions; in this program, noncash contributions are limited to a \$500 maximum.)
 - Unreimbursed medical expenses including premiums, copays, medical bills, and prescriptions not paid by insurance.
 - Child or dependent care expenses such as daycare or afterschool care
 - Mortgage interest and property taxes you paid
 - Ad Valorem taxes paid on your vehicle
 - Gambling winnings, prizes, or other winnings
- **Last Year's Tax Return:** if you have last year's tax return, please bring it with you. It may contain the answers to some questions we may have about this year's return.
- **Bank Information:** If you want to receive your refund by direct deposit or pay your balance due with direct debit, please bring a blank check showing your account and routing numbers.

For married taxpayers: filing a joint return with your spouse will usually give you a better result than filing separate returns. Whichever way you choose to file, there are some things to know:

- **If you plan to file jointly,** both you and your spouse must be present to review and sign the return.
- **If you are filing separately** from your spouse, please bring your spouse's social security number, as it must be included on the return. It would also be helpful to know whether your spouse is