Items Required for VITA Tax Preparation

Please gather the following documents for your tax preparation. These documents are required to file your taxes. If you do not have them, use the links to get copies of the documents.

Original Social Security cards or ITINs for everyone on the return - NO exceptions.
The only other acceptable document is the 1099-SSA. You may obtain a replacement Social Security card or 1099-SSA at **ssa.gov.**

Photo Identification for each spouse on the return
Both spouses must be present and sign if filing jointly. Married Filing Jointly is the most advantageous filing status with a few exceptions. If choosing Married Filing Separately, you will need your spouse's Social Security number and last year's earnings, in order to electronically file. Without your spouse's social security number and birthdate, you will mail a paper copy of your return. This will significantly delay any refund.

All W-2s, 1099s, and Income Documents
These can include: Business Income, Social Security income, Retirement Income, Unemployment Income, Interest from a savings account, 1099-A, Dividends, Cash Income and Gambling Income. To obtain a Wage Transcript from the IRS because of missing documents, go to **irs.gov/transcript** or call (800) 908-9946. Please make sure to request a non-redacted transcript.

Advance Child Tax Credit letter
For those that received advance Child Tax Credits in 2021, letter 6419 was sent to homes. To complete your 2021 tax return, and accurately reconcile, please bring Letter 6419 or provide the information from your **online account**.

Proof of Expenses
These can include charitable donation receipts, 1098-T education expenses, child care and dependent care expenses. For taxpayers wishing to itemize, please **use this worksheet**.

Self-Employed or Contract Labor
You will need documentation from your service, along with income expense records. (On-demand driver? Ridesharehelp.com has free resources including a downloadable tax guide, step-by-step instructions, and calculators, or you can use **this worksheet.**

Form 1095-A
Only if you have health insurance through the Marketplace. To obtain your 1095-A, go to **healthcare.gov** or call (844) 644-5543.

Form-1099SA
Only if you have a Health Savings Account (HSA).

Direct Deposit Information
For the refund to be deposited directly to your bank (the safest and fastest way), you will need the routing number and account number. This can be found on a check.

Previous Year's Return
Last year's returns are not required but is helpful to have with you. If you are filing yourself or the first time using a new software, federal law requires you to submit your AGI (Adjusted Gross Income). This can be found on your previous year's return. If you do not have a copy, you can obtain a transcript at **https://www.irs.gov/individuals/get-transcript.**

Home Interest and Taxes
Interest and taxes are important deductions! Please bring Form 1098 for mortgage interest, property tax statements, and/or closing statements.

United Way of Greater Atlanta