VITA 2012 Client Documentation List

Please bring the following documents to your appointment:

Identification:

- Valid picture ID such as a driver's license for all taxpayers
- Copy of your 2011 tax return (if you have it)
- Social Security cards or ITIN letters for yourself, your spouse and your children and other dependents
- Birth dates for you, your spouse, your children and other dependents *(birth certificates are not required)*

Income documentation including:

- W-2, W-2G and 1099-R Forms from all employers in 2011
- All 1099 Forms from interest and dividends showing other income received in 2011

For Direct Deposit of your refund:

- A cancelled blank check for direct deposit of your refund (If you don't have a check book, bring your bank account name, account number, and 9-digit American Bankers Association (ABA) routing number. Contact your bank if you need assistance identifying the ABA number.)

Also, if any of the following apply, please bring documentation with you:

- Child care expenses, including the provider's address and Federal ID #
- Mortgage company statements
- Adoption expenses
- Alimony paid or received
- Documentation for the purchase of a home
- Any notices received from the IRS or state tax office
- Property tax bills
- College tuition and student loan interest statements
- Additional forms of income such as:
- Prizes and awards
- Scholarships and fellowships
- Lottery / gambling winnings