

2012 VITA Checklist

Getting Help to Prepare your Taxes

What to Bring with You



If you need help completing tax forms, a Volunteer Income Tax Assistance (VITA) site near you can help. Call 1-800-906-9887 to find the nearest location. When you go to a VITA site, or if you choose to go to a commercial tax preparer, be ready. **Take these items with you:**

- Valid picture ID
- Copy of 2010 tax return (if you have it)
- Social Security Cards, Social Security Number verification letters or Individual Taxpayer Identification Number (ITIN) letters for you, your spouse and any children born before December 31, 2011.
- Income documentation including:
 - W-2 Forms from all jobs worked in 2011
 - All 1099 Forms showing other income received in 2011
 - A blank check for direct deposit of your refund (If you don't have a checking account, bring your bank account name, number and the 9-digit American Bankers Association (ABA) routing number. Contact your bank if you need assistance identifying the ABA number.)

If any of the following apply to you, take documentation with you:

- Child care expenses, including the provider's address and federal ID #
- Mortgage company statements
- Adoption expenses
- Alimony paid or received
- 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

If you lost or do not have all of these items, you can still get your taxes prepared. Call the IRS helpline at 1-800-829-1040 to find out what you need to do and how to obtain replacement documents.