



VITA SITE - TAX DOCUMENT CHECKLIST

Free Tax Return Preparation

Name: _____

Tax Year: _____

You can securely upload all your documents at: <https://thewelcomecenter.org/documents/upload>

1. IDENTIFICATION AND PERSONAL INFORMATION

- ☐ Original photo ID for the taxpayer and spouse, if filing jointly.
- ☐ Social Security cards (SSN) for the taxpayer, spouse, and all dependents.
- ☐ ITIN assignment letter if anyone included on the return does not have an SSN.
- ☐ IRS IP PIN for the taxpayer, spouse, or dependents, if issued.
- ☐ Dates of birth for the taxpayer, spouse, and dependents.

2. PRIOR-YEAR RETURN AND BANK INFORMATION

- ☐ Copy of the prior-year federal and state tax return, if available.
- ☐ Routing Number and Account Number for direct deposit (preferably a voided check or bank verification).

3. INCOME DOCUMENTS

- ☐ W-2 - wages and salaries.
- ☐ 1099-R - pensions or retirement distributions.
- ☐ SSA-1099 - Social Security benefits.
- ☐ 1099-INT / 1099-DIV - interest and dividends.
- ☐ 1099-NEC / 1099-MISC / 1099-K - self-employment or other income.
- ☐ 1099-G - unemployment or other government payments.
- ☐ W-2G - gambling winnings.
- ☐ 1099-B - sales of stocks or investments, if applicable.
- ☐ Any other income statement or document received during the year.

4. SELF-EMPLOYMENT / INDEPENDENT CONTRACTOR INCOME

- ☐ 1099-NEC / 1099-K / 1099-MISC received for services or sales.
- ☐ Record of ALL income, including cash, Zelle, Venmo, Cash App, or other payments not reported on a 1099.
- ☐ Summary of business expenses by category and available receipts.
- ☐ Business mileage log, if you used your vehicle for work.
- ☐ Business name and type of activity; EIN, if applicable.

5. HEALTH INSURANCE / MARKETPLACE

- ☐ Form 1095-A - Health Insurance Marketplace Statement, if you or anyone in your family had Marketplace coverage.

6. DEPENDENTS AND CHILD/DEPENDENT CARE

- ☐ Name, address, and SSN/EIN of the daycare or dependent-care provider.
- ☐ Total amount paid for daycare or dependent care during the year.

7. EDUCATION AND OTHER DOCUMENTS, IF APPLICABLE

- ☐ Form 1098-T and documentation of qualified education expenses.
- ☐ Form 1098-E - student loan interest.
- ☐ Form 1098 - mortgage interest.
- ☐ 1099-SA and other HSA information, if applicable.
- ☐ Proof of estimated tax payments or other payments made to the IRS/state.
- ☐ Any letter or notice received from the IRS or state Department of Revenue.

IMPORTANT Married Filing Jointly: Both spouses must be present to sign. • Bring your documents or upload them to the platform in advance. • Some self-employment situations (employees, inventory, losses, depreciation, or other complex circumstances) may be outside the scope of VITA.