

What to Bring to Your Free Tax Appointment



Please bring the following documents, if applicable.

Occasionally, you might need a document not on this list. If it says "tax," bring it!

Who should attend the appointment

- If married, filing jointly: Both spouses must be present.
- Dependents do not need to be present unless they are filing their own returns.

Identification

- ☐ Photo identification (original): Driver's license, state ID, school ID, or military ID for you and your spouse (if filing jointly).
- ☐ Social Security cards or ITIN letters for you, your spouse, and all dependents.
- ☐ Identity Protection PIN (IP PIN) issued by the IRS for 2026.

Tax Documents

- ☐ Last year's tax return (recommended for VITA sites; required for AARP tax sites).
- ☐ All W-2 forms from employers.
- ☐ Notices from IRS or state tax agencies.
- ☐ Form 1095-A (Health Insurance Marketplace statement) if applicable.
- ☐ Form 1099-SA (distributions from an HSA) if applicable.
- ☐ All 1099 forms, including but not limited to:
 - 1099-INT (interest income)
 - 1099-DIV (dividends)
 - 1099-R (retirement income)
 - 1099-SSA (Social Security benefits)
 - 1099-MISC (miscellaneous income)
 - 1099-K (third-party payment processing income)
 - 1099-NEC (non-employee compensation)
 - 1099-G (unemployment income, state refund)

Other Income

- ☐ Self-employment / gig work income (including cash)
- ☐ App-based work (DoorDash, Uber, Lyft) statements
- ☐ Cash tips (not reflected on W-2)
- ☐ Gambling winnings (W-2G if provided)
- ☐ Form 1098-T (tuition statement), scholarships or fellowship grants used for living expenses
- ☐ Foreign income
- ☐ Other income not reported on a W-2 or 1099

Direct Deposit Information

- ☐ Bank routing number and account number, or voided check (preferred)

Expense and Deduction Information (if applicable)

- ☐ If self-employed, listing of all business expenses (including car information and business miles driven)
- ☐ Overtime paid, overtime hours worked and rate paid, or final paystub if information is included
- ☐ Interest paid and vehicle information for new vehicles purchased in 2025
- ☐ Total paid to day care or child care provider, plus provider's name, address, and tax ID number (EIN or SSN)
- ☐ Energy-efficient home improvement receipts (if claiming credits)
- ☐ Form 1098-E (Student Loan Interest Statement)
- ☐ Mortgage interest (1098) and property tax statements
- ☐ Contributions to retirement accounts (Form 5498)
- ☐ List of medical expenses if above \$2,000 total
- ☐ Records of charitable donations

For Prior-Year Returns

- ☐ Copies of all income documents or IRS transcripts and state transcripts, if applicable.