

WHAT TO BRING TO YOUR LOCAL VITA SITE

To file taxes electronically on a married-filing-joint tax return, both spouses must be present to sign the required forms.

To get your taxes done, you MUST have:

- Government ID for the client and spouse (if applicable)
- Social Security Card for the client and all household members
- All 2024 tax documents
- Prior year's tax returns

Depending upon your situation, you might have:

- Wage and earning statements (Form W-2, W-2G, 1099-R, 1099-NEC) from all employers
- Interest and dividend statements from banks (Forms 1099)
- 1099-G for unemployment or state tax refunds
- Total paid for daycare provider and the daycare provider's tax identifying number, such as their Social Security Number or business Employer Identification Number
- Form 1095-A, Affordable Health Care Statements, if anyone used ACA in 2024
- 1098-T and statement of expenses, if attending college
- Proof of bank account - routing and account numbers for direct deposit, such as a blank check
- Other IRS and state tax documents you received

Updated January 13, 2025