Bergen Volunteers VITA Program: Tax Appointment Preparation Checklist

To ensure your tax return is completed accurately and efficiently,
please bring the following documents to your appointment.

Important: If filing a joint return, Taxpayer & Spouse MUST be present during the final review.
Both must also be present, with ID, to pick up the return.

☐ 1. Essential Identification

- **Photo ID:** For taxpayer and spouse.
- **Social Security / ITIN:** Cards or letters for **everyone** in the household.
- **Last Year's Return:** A copy of your 2024 Federal and State tax returns.

☐ 2. Income Documents

- **W-2s** from all employers.
- **1099-R:** Pension, annuities, or IRA distributions.
- **1099-SSA:** Social Security benefits statement.
- **1099-G:** Unemployment compensation.
- **1099-INT / 1099-DIV:** Interest and dividend statements.
- **1099-MISC / 1099-K:** For self-employed or gig work (e.g., Uber, Lyft).
    - *Note: Self-employed expenses must be totaled by category before the appointment.*
- **Other Income:** Cash tips, jury duty pay, or gambling winnings.

☐ 3. Healthcare & Education

- **Form 1095-A:** Required if health insurance was purchased via the Marketplace (ACA).
- **Form 1098-T:** Tuition statements for college, plus receipts for books or supplies.

☐ 4. Expenses & Credits

- **Child Care:** Provider's name, address, and Tax ID (EIN) or SSN.
    - *Note: Cash payments require a notarized letter from the provider.*
- **Education Expenses:** Costs for books, computers, or supplies.
- **Itemized Deductions (if applicable):** Totaled medical expenses, mortgage interest statements, vehicle registration, and charitable contributions.

☐ 5. Direct Deposit Information

- **Banking Info:** A voided check or your bank routing and account numbers for a faster refund.

Questions? Call us at **201-777-3177**.