



# VITA Checklist

## Getting Help to Prepare your Taxes — What to Bring with You

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If you need help completing tax forms, a Volunteer Income Tax Assistance (VITA) site near you can help. Call 1-800-829-1040 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 2004 tax return (if you have it)
- Social Security numbers or Individual Taxpayer Identification Numbers (ITIN) for you, your spouse and any children born before December 31, 2005 (If available, bring the Social Security cards or ITIN letters to ensure information is copied correctly onto the tax return.)
- Income documentation including:
  - W-2 Forms from all jobs worked in 2005
  - All 1099 Forms showing other income received in 2005
  - A blank check for direct deposit of your refund (If you don't have a checking account, bring your bank account 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.**