

2021 VITA REQUIRED DOCUMENT LIST

1. Make sure you qualify for free VITA tax preparation:

___ Under \$57,000 total household income (if over refer to [myfreetaxes.org](https://www.irs.gov/efile)).

___ We cannot help you if you are self-employed.

2. List of documents received:

___ W2s (salary income) ___ 1099 (interest from your bank)

___ 1099-misc ___ 1098-T (education tuition expenses)

___ 1098 (mortgage interest) ___ 1099R (Pension & Annuity)

___ 1095 A, B or C (insurance)

3. If the following apply, please have the documentation needed:

___ Did you pay for childcare or dependent care? **Need:** provider Name, address, and tax ID number for childcare credit.

___ Do you rent? **Need:** name, address, and phone number of landlord for Renter's credit.

___ Did you pay for **Qualified tuition and related expenses**. (Tuition and fees a student must pay to be enrolled at or attend an eligible educational institution. **Need** form 1098-T for Education credit)

___ Is anyone in your household over 65 year of age, retired or permanently and totally disable? for Elderly or Disabled credit.

___ Did you buy a brand-new car this year? **Need** purchase contract for New Vehicle purchase credit.

4. You must take copies of the following:

- Social Security Card for each family member or ITIN for each working adult.
- W-2(s) and any other forms (checked above).
- Bank routing number and account number for direct deposit.
- 2020 tax return (if you have it).

5. Complete the following IRS Forms:

- Form 13614-C Intake Interview & Quality Review Sheet
- Form 14446 Virtual VITA/TCE Taxpayer Consent