

Catholic Social Service – Free Income Tax Preparation - VITA Site

Below is a list of items needed to process your tax return:

Charitable Donations:

- Charity receipts or cancelled checks
- Pay stub if money is deducted from paycheck
- Records of the mileage used for charitable purposes (scouting, etc.)

Child Care Costs:

- Canceled checks or receipts
- Providers name and address
- Providers tax ID # or social security number

Direct Deposit Information:

- If you want your refund deposited directly into your bank account, we need your bank's routing number and your account number. (Note that some checking account bank deposit slips have a different routing number than your actual checks show – get the number off of your checks.)

Educational Costs:

- Tuition bills or cancelled checks
- Form 1098-E showing student loan interest paid or loan statements.
- Educator expenses: cancelled checks for expenses paid for classroom supplies, etc.

Income Information:

- W2 forms from all employers you and your spouse worked for this past year.
- 1099-INT forms: shows all interest earned from bank accounts.
- Alimony: bank statements or records of deposit.
- Unemployment: 1099-G form or unemployment check stubs and deposit records.
- Social Security Benefits: For SSA-1099.
- Jury Duty pay records
- Forms W-2G for gambling or lottery winnings
- Form 1099-MISC for prizes or awards you received.
- Receipts that show rental income or other type of self employment income.

Itemized Deductions for Medical and Dental Expenses:

- Cancelled checks or money orders
- Form SSA-1099 for Medicare premiums paid from your SS benefits.
- Year end pay stub from work if your health insurance premiums were deducted as after tax.
- Mileage records for trips to the doctor and clinics.

IRS Contributions:

- Year end account summary or bank statements.

Moving Expenses:

- Invoices from moving companies, or
- Cancelled checks and paycheck stub for moving expense reimbursements.

Self Employed:

- Insurance premiums
- Receipts to show expenses as a result of being self employed
- Mileage records

Personal Information:

- Social Security cards of all people you are claiming on your tax return.
- Birthdates of all people you are claiming on your tax return.

State and Federal Return from last year.