What to bring when you visit a VITA site

You must have a Photo ID for yourself and your spouse, and Social Security Cards or ITIN letters for yourself, your spouse, and any dependents you will be claiming on your return.

Checklist of Items to Bring:

- Proof of Identification for you and your spouse (if filing jointly). This must be a photo ID.
- Social Security Cards or ITIN numbers for yourself, your spouse, and any dependents you will be claiming this year.
- Your Spouse, if you are filing a married filing a joint return. Both spouses must be present to sign the required forms.
- Birth dates for you, your spouse, and any dependents you will be claiming on your return.
- Last year's Tax Returns, both State and Federal, if you have them.
- Bank Routing and Account Numbers if you want to direct-deposit your return (a check will have this information on it).
- All Wage and Earnings Statements for both you and your spouse (if you are filing jointly), from all employers and banks. This includes forms W-2, W-2G, and all forms 1099 (for example SSA-1099, 1099-MISC, 1099-R, 1099-DIV, 1099-INT, etc.). If you are unsure whether or not a form you have is needed, bring it with you just in case. If you are missing a W-2, contact the employer for a duplicate before you come in.
- Self-Employment Income (1099-Misc or Manual Records) if you run a business or perform odd jobs and the associated expenses (Schedule C-EZ Only)
- Unemployment Income (1099-G). If you received unemployment during 2014 the state will mail or e-mail you a 1099-G. If you did not receive the 1099-G, obtain your 1099-G online at Department of Workforce Development website or contact the state to obtain it before you come in.
- The amount of any Tip Income or Alimony Received.
- Did you sell stocks? You will need to know the Gain/Loss from Sale of Stocks (1098-B and/or Broker's Statements). Contact your broker if you do not have this information.
- The total amount you paid for Day Care, and the Day Care Provider's Tax Identifying Number (the provider's Social Security Number or their business Employer Identification Number).
- Educational Expenses (Forms 1098-E/1098-T and receipts/statement of account for tuition, books, supplies and equipment required for enrollment or attendance) and Scholarships/Grants received. Bring both your 2014 and 2013 1098-T.
- Alimony Paid and Recipient's Social Security Number.
- Amount of any IRA contributions
- Information on Debt Forgiveness (1099-C, Credit Card Only).

What to bring when you visit a VITA site

- If you received a First-Time Homebuyer's Credit in a previous year, bring information on the purchase date and the amount of credit you received.
- Receipts for any Qualified Energy-Efficient Home Items Purchased (such as windows, furnaces, insulation, water heaters, etc.) and any Prior Year Energy Efficient Credits Received.
- Property Tax Receipts for any property taxes Paid in 2014 and your 2014 Property Tax Bill, even if not paid.
- Amount of Rent Payments made in 2014.
- Home Mortgage Interest (generally reported on Form 1098).
- Paperwork showing the Amounts Donated to Qualified Charitable Organizations (such as church or donations taken to Goodwill).
- Receipts for any Medical or Dental Expenses you paid during 2014 that were not reimbursed by your health insurance. This includes premiums for medical/dental insurance that are paid by you (amounts paid by employer or taken pre-tax on your paycheck do not qualify).
- List of who on your tax return had health insurance coverage in 2014 and for which months they were covered. Need 1095-A form if insured through an Affordable Care Act Marketplace health insurance plan.
- Health Savings Accounts Information (5498-SA, 1099-A).
- Unreimbursed Employee Expenses (such as union dues, or required safety equipment that your employer does not pay for) if itemizing on Schedule A.
- Documentation for any Gambling Losses (up to the amount of gambling winnings received) if itemizing on Schedule A.
- If you itemized last year (your return included a Schedule A), you will need to bring the Amount of State Refund You Received Last Year. This is reported on form 1099-G which can be obtained on-line at Wisconsin Department of Revenue website.
- Estimated Federal & State withholding tax payments made.

If you believe you will be eligible for Wisconsin Homestead Credit, bring the following:

- Original and Unaltered Rent Certificate and/or copy of 2014 Property Tax Bill.
- Printout of any Wisconsin Works (W2) Payments Received in 2014.
- County Relief, Kinship Care, or Other Cash Public Assistance received.
- SSA, SSI, SSI-E or Caretaker Supplement received.
- Child Support or Maintenance Payments received.