VITA Free Income Tax Assistance Program

www.orangecountync.gov/aging/VITA.*asp*

Orange County Department on Aging

endless possibilities

What to Bring to Your Appointment for Tax Year 2015 Returns

1. Photo identification for taxpayer and spouse (if married). Both spouses must be present to sign a joint return

2. Social Security cards for you, your spouse and dependents (copies are acceptable)

3. An Individual Taxpayer Identification Number (ITIN) assignment letter may be substituted for you, your spouse and your dependents if you do not have a Social Security number

4. Birth dates for you, your spouse and dependents on the tax return

5. Copies of last year's (**2014**) federal and state tax returns

6. All wage and earning statements for income received in 2015**:** W-2 forms, social security income, pension, unemployment, retirement income and other forms showing earnings

7. If you are self-employed and eligible, bring receipts for expenses and statements of income.

8. Interest and dividend statements from banks and investments (Forms 1099)

9. Health care documentation from your insurer including any amounts paid by your employer and for each person named on the tax return (Medicare, Medicaid, private insurers). If you receive a W-2 and your employer offers your health insurance, it will be noted on your W-2.

10. Affordable Health Care Insurance Statement from the Marketplace, Form1095 (A, B, or C). If you have dependent(s), bring ALL their income information.
For more information: www.irs.gov/Affordable-Care-Act OR www.healthcare.gov/taxes)

11. Amounts paid for day care or after school care and provider's identifying tax #

12. Education Credits: 1098T statement along with receipts for books, fees and expenses paid as a requirement for enrollment. Bring a statement from the college showing required expenses.

13. Dollar totals by category for medical expenses (doctor, dentist, hospital, prescriptions, parking and miles driven to doctor/dentist) & charitable donations and volunteer miles

14. Receipts for mortgage interest, personal property tax, real estate tax, vehicle tax paid

15. Home sold in 2015: All records of home sales, including closing statements for original purchase and sale of your home

16. Stock sales in 2015: All records of sales & date and price of original purchase

17. Refund Direct Deposit or Amount Owed Withdrawal: Provide bank routing & account numbers such as on a check. To ensure accuracy, provide a check for your preparer to view.

18. Phone number where you can be reached **day and night** (Email address if available)

19. Any and all information you receive from the IRS