

Tompkins County Area Volunteer Income Tax Assistance Program (VITA)

What you should bring to your tax appointment:

We need you to organize and bring some documents with you to your appointment at the site. Please read through this document in its entirety and be sure to bring everything applicable on the list, as it will help us to complete your return in a more efficient and complete manner. Failure to bring these documents, if applicable, may result in us not being able to complete your return.

First, we need to verify your identity, to do so, you need to bring the following 2 items:

1. Government-issued Photo Identification (like a driver's license or passport)
2. Social Security Cards
 - a. We need one for EACH person who will be listed on the return, including yours, your spouse's, and one for EACH of your dependents.

Next, we need you to bring some old tax documents and bank information with you to aid in the preparation of your return:

3. Your tax return from last year (if you have it). While not required, this tax return is helpful in preparing your return this year.
4. Bank account information and routing number. To help get your refund quickly, we usually recommend direct deposit methods. This information will help us set that up for you. You can bring a copy of a blank check or checkbook if you have it.

Finally, we need you to bring your tax documents with you to the appointment. These include the following (and may include more):

5. If you had a job in 2023, bring:
 - a. A copy of your W-2 for EACH employer you worked for last year.
 - b. Any other income statements like Forms 1099 (Form 1099-NEC, 1099-MISC, 1099-K).
 - c. Documentation of any cash or other income received during last year.
6. If you were unemployed at ANY time in 2023, bring:
 - a. A copy of Form 1099G that includes both the unemployment compensation you received as well as any federal/state tax withheld. You can access this form in your online account for the Department of Labor.
7. If you had retirement income in 2023, bring:
 - a. All Forms 1099-SSA (Social Security Statements)
 - b. All Forms 1099-R. These are distributions from any Pension, IRA, Annuity, or other Retirement Accounts. If you received a letter from TIAA about state tax,

please bring that letter. If you have railroad benefits reported on a 1099-RRB, please bring that as well.

8. If you had any investment income (dividends, interest, stock sales), bring:
 - a. A copy of Form 1099-INT, reporting the interest. Please note that if you only received a few dollars of interest from an account, you likely did not receive a 1099-INT.
 - b. A copy of Form 1099-DIV, reporting dividend income.
 - c. A copy of Form 1099-B showing any stock sales during the year. Please note that if you traded cryptocurrency in 2023, we are not permitted to prepare your return.
9. If you had any of the following situations, please bring documentation and the form in parentheses:
 - a. Sold real estate (Form 1099-S)
 - b. Had debt forgiven (Form 1099-C)
 - c. Received interest from the IRS on your refund (Form 1099-INT from the IRS)
 - d. Had any other type of income (bring documentation about that income).

We'll also want to consider deductions and credits that could lower your tax liability.

10. If you paid interest on a student loan, please bring Form 1098-E
11. If you paid any tuition or higher education expenses, please bring:
 - a. Form 1098-T and the billing statement from the school.
 - b. Information about the students.
 - c. The source of the funds (i.e., were they from a 529 account, student loans, Pell Grants, or did you pay them directly)?
12. If you made Qualifying Charitable Distributions from an IRA, please bring documentation showing that.
13. If you paid for daycare for a dependent, please bring:
 - a. The amount paid for daycare for each dependent.
 - b. The tax ID or social security number for the daycare provider.
 - c. Information regarding dependent care FSA accounts (if you have one).
14. If you have a Health Savings Account, bring:
 - a. Form 1099-SA and Form 5498-SA.
 - b. Verification that all distributions were made for qualified medical expenses.
15. If you think you may itemize deductions, please bring information pertaining to medical expenses, other taxes paid, any mortgage interest paid, and charitable contributions. If you don't expect to itemize, you don't need to bring these items.
16. If you purchased health insurance from the Healthcare Marketplace (NY State Department of Health), please bring Form 1095-A.

Finally, for New York State purposes, please bring the following:

17. If you own your home and received a STAR exemption or check for your school taxes, please bring copies of both your 2023 tax bill AND receipts for payment of that tax bill. In addition, if you receive a check for STAR, please bring the amount of that check.