



What to bring to our Free Tax Help (Mandatory Items)

- Last year's tax return(s).
- Social Security cards and/or ITIN or other official documentation for yourself and everyone on your return.
- Photo I.D. required for all taxpayers.
- Checkbook if you want to direct deposit any refund(s).

Income:

- W-2 from each employer, and 1099-G for unemployment
- Unemployment compensation statements
- SSA-1099 Form showing the total Social Security paid to you or Form RRB-1099
- 1099 Forms reporting interest (1099-INT), dividends (1099-DIV), proceeds from sales (1099-B), as well as documentation showing the original purchase price of your sold assets
- 1099-R Form if you received a pension, annuity, or IRA distribution
- 1099-MISC Forms and 1099-K
- Information about other forms of Income
- Amount of state or local income tax refunds

If Itemizing You Will Need to Bring the Following:

- 1098 Form showing any home mortgage interest
- A list of medical/dental expenses
- Summary of contributions to charity
- Receipts or canceled checks for all quarterly or other paid tax
- Property Tax bills and proof of payment

Health Insurance:

- 1095A Forms if you purchased insurance through the Marketplace (Exchange)
- 1095B/1095C Forms (if applicable)
- Any exemption correspondence from the Marketplace (if applicable)

Credits:

- Dependent care provider information (name, employer ID, or Social Security number)
- 1098-T and 1098-E Forms (Tuition and Student Loan Interest)