

Items to Bring for Tax Return Preparation:

All taxpayers need to bring item number **1 and 2** below, **plus** all other items which **apply to you**.

1. **Photo ID** (adults); if married, filing jointly, both spouses must sign return
2. **Social Security Card** for you, spouse, and dependents
3. ITIN (Individual Taxpayer Identification Number) - only for people who do not have a SS# and are not eligible to obtain one; generally applies to resident and non-resident aliens
4. Wage statements from all employers (W-2); not pay stubs
5. Interest and Dividend Statements; Investment statements (1099-INT, 1099-DIV)
6. Retirement Income - IRA and Pension statements (1099-R)
7. Social Security annual statement if receiving social security (SSA-1099)
8. Social Security Disability - if applicable; proof of amount (SSDI and SSI)
9. Other income statements, including unemployment compensation (1099-C, 1099-MISC, W2-G, 1099-G)
10. If Self-employed – tallied record of all gross receipts and expenses
11. Any other tax-related statements received, such as Mortgage Interest Statement (1098), Tuition Statement (1098-T), and Student Loan Interest (1098-E)
12. Vermont Health Connect statement (1095-A) **IF** you received health insurance from VHC; other health insurance forms helpful but not required (1095-B/C)
13. Health Insurance Exemption Certificate IF you received one from Vermont Health Connect (VHC); or letter from VHC if you are still waiting for certificate
14. Bank routing and account numbers (written), if electing direct deposit
15. Statement from registered daycare provider, if applicable
16. **Homestead Declaration** - Current Property Tax bill for homeowners
17. **Renter's Rebate** - Original Landlord Certificate (LC-42); OR computer printout with code number if Landlord completed the certificate online
18. **IF applying for Renter's Rebate or Property Tax Adjustment** (aka Prebate), bring taxable & non-taxable income and SS# for everyone who lived with you last year
19. Last year's income tax returns can be helpful if available, not required.