

Key Documents Needed for VITA Tax Preparation 2021 Tax Year:

(Use for reference, not a complete list)

Category	✓ Document Required	Explanation
Identification	<input type="checkbox"/> Photo ID	Required for you and/or spouse if filing jointly
	<input type="checkbox"/> Social Security Cards or ITIN letters	A card is required for every member of your family appearing on the return
	<input type="checkbox"/> Identity Protection Pin	If the IRS issued you an Identity Protection PIN (IP PIN), This is a six-digit number
Income Documents	<input type="checkbox"/> W-2, 1099-NEC or 1099-MISC	Form ALL jobs worked in 2021
	<input type="checkbox"/> W2-G	If you received any gambling income (over \$1200)
	<input type="checkbox"/> SSA-1099	If you received Social Security Income
	<input type="checkbox"/> 1099-G	If received unemployment benefits
	<input type="checkbox"/> 1099-INT or 1099-DIV	If you received income from interest or dividends
	<input type="checkbox"/> 1099-R	If you have retirement Income
	<input type="checkbox"/> 1099-C	If you had any cancelled debt
	<input type="checkbox"/> Business income records	If self employed
Tax Credits	<input type="checkbox"/> Letter 6419	If you received Advanced Child Tax credit
	<input type="checkbox"/> Letter 6475	If you received the third Economic Impact Payment (EIP Stimulus)
	<input type="checkbox"/> Provider SSN#/EIN#, name & address	If you have childcare or dependent care costs
Tax Deduction and Expenses	<input type="checkbox"/> Medical expenses	If total exceeds 7.5 % of AIG
	<input type="checkbox"/> Job related business expenses	If self-employed
	<input type="checkbox"/> 1098 Mortgage statement	If you have home mortgage interest
	<input type="checkbox"/> Records of charitable contributions	If any contributions were made in 2021
	<input type="checkbox"/> 1098E or 1098T	If you have a Student Loan or Tuition Statement
	<input type="checkbox"/> Educational expenses	If student
	<input type="checkbox"/> IRA contributions	Any contributions not on W2
	<input type="checkbox"/> Property tax payment records	If you are over 65 years old or have dependents
Other	<input type="checkbox"/> 1095-A	If received health insurance from the Marketplace (Access Health CT)
	<input type="checkbox"/> Last year's tax return	If available
	<input type="checkbox"/> Bank Routing and Account Number	If you wish Direct Deposit