

BRING THIS INFORMATION WITH YOU FOR YOUR TAX APPOINTMENT!

- Military identification cards/Photo ID
- Birthdates for all people who appear on the return
- If filing joint, both members must be here or one can return later to sign (Will not e-file until both sign)
- If one spouse is deployed, need IRS form 2848 or power of attorney
- If divorced or separated and claiming a dependent that does not live with you bring divorcee decree (2008 or before), 2009 and after must have signed form 8332
- W2s, W2-G, 1099R, etc.
- 1099 INT, 1099 DIV (If you had interest, dividends or capital gains)
- All social security cards, including children (original, or last year's return with SSN, ITIN, or ATIN)
- Copy of last year's federal tax return and if you live in Iowa you **MUST** bring the Iowa return
- Bank information with routing & account number (voided check preferred, **no deposit slips**)
- Child care expenses (Must include name, address & tax ID of provider)
- Educator expense: (Teacher K-12 grade)
- If paying on student loan, need document showing interest paid
- 1098T (If you had college education expenses)
- If you contributed to an IRA (Traditional or Roth): you need to know which kind and how much you contributed for 2012.
- December LES
- Charitable contributions, personal property tax on vehicles
- Sales tax amounts for large ticket items purchased i.e.: car, boat, RV, major home improvements
- If sold stock or mutual funds, need cost basis for shares sold
- If you own your home: the mortgage interest, real estate taxes paid and other pertinent documents. If you purchased the home in 2012 bring your HUD-1 statement
- If you took the first-time homebuyer credit, (interest free loan) in 2008 for \$7,500, you began paying it back on your 2010 tax return and will continue to repay the \$500.00 until 2025.
- If you took the first-time homebuyer credit of \$8,000 in 2009/2010 and PCSed in 2012 you will need to bring a copy of your orders to attach to the return so you do not have to pay the \$8,000 back if you sold or rented the home.
- If you paid alimony: you need to have the SSN of who received it and how much you paid.
- If you received alimony you need to know the amount you received.
- Home business – income, **expenses can be no more than \$5,000**, must meet VITA rules for us to complete return. Ask about this when you call to set up your appointment.
- Self employed – 1099 Misc and all expenses, but not more than \$5,000
- Rental income/expenses, ie: insurance, mortgage interest, real estate taxes, repairs, management fees
- Any other documentation for income or deductions not mentioned above.