

## **What to Bring to Your Tax Appointment**

Preparing a tax return can be a daunting prospect. Fortunately, Harford County is providing no-cost assistance for those in need.

Whether you are utilizing the Volunteer Income Tax Assistance (VITA) program for free tax preparation or the AARP/Harford County Tax Aide program, there are certain documents and forms of identification you will need to bring with you.

**Please call the organization you will be working with if you have additional questions.**

**VITA (working out of the LASOS, Inc. office): 410-836-0333**

**AARP/Harford County Tax Aide office: 410-638-3425**

- ✓ Proof of identification (photo ID)
- ✓ Social Security cards for you, your spouse and dependents
- ✓ An Individual Taxpayer Identification Number (ITIN) assignment letter may be substituted for you, your spouse and your dependents if you do not have a Social Security number
- ✓ Proof of foreign status, if applying for an ITIN
- ✓ Birth dates for you, your spouse and dependents on the tax return
- ✓ Wage and earning statements (Form W-2, W-2G, 1099-R, 1099-Misc) from all employers
- ✓ Interest and dividend statements from banks (Forms 1099)
- ✓ All Forms 1095, Health Insurance Statements
- ✓ Health Insurance Exemption Certificate, if received
- ✓ A copy of last year's federal and state returns, if available
- ✓ Proof of bank account routing and account numbers for direct deposit such as a blank check
- ✓ To file taxes electronically on a married-filing-joint tax return, both spouses must be present to sign the required forms
- ✓ Total paid for daycare provider and the daycare provider's tax identifying number such as their Social Security number or business Employer Identification Number
- ✓ Forms 1095-A, B or C, Affordable Health Care Statements
- ✓ Copies of income transcripts from IRS and state, if applicable