VOLUNTEER INCOME TAX SCREENING
TAX YEAR 2017

To Make an Appointment:

860-560-4210

860-560-5149

EVERYONE NEEDS TO BRING

- ❑ **You must bring picture Identification Cards and Social Security Card(s) or Individual Taxpayer ID Number(s) and birth dates for all household members EVEN IF YOU FILED WITH US IN PREVIOUS YEARS.**
- ❑ Last Year's Return if You Have One
- ❑ For direct deposit, a check or savings account number with routing number (copy of check)
- ❑ If you are filing married filing jointly, both you and your spouse need to be present to sign the Income Tax Form. We cannot help you file your taxes until your spouse is present to sign the form
- ❑ Documentation of Property Tax Payments (home, auto)

BASIC RETURN TAX DOCUMENTATION

Income

- ❑ Wages or Salary (W-2)
- ❑ Dividend Income (1099-DIV)
- ❑ Gambling Winnings (W-2G)
- ❑ IRA's Pension and Annuities **only if the taxable amount is in box #2.**
- ❑ Interest Income (1099-INT)
- ❑ Unemployment (1099-G)
- ❑ Social Security Benefits (SSA-1099)
- ❑ Railroad Retirement (RRB-1099)
- ❑ Alimony Income

Other Documentation - Basic

- ❑ Forms 1095-B or 1095-C - Health Insurance Statements, Health Insurance Exemption Certificate issued by Access Health CT, if received.
- ❑ Child Day Care Expenses - Child care provider name, address and tax ID or Social Security number if you pay for childcare (Basic Return)
- ❑ **Education expenses (1098-T and print-out of billing statement for educational expenses for 2017) (Note: We cannot complete the education credit without the billing statement showing tuition billed and paid in 2017).**
- ❑ Student loan interest payment information.
- ❑ If you wish to **itemize deductions** you also need to bring a list of your medical, interest (home mortgage interest, mortgage insurance premiums (Form 1098), documentation of Property Tax Payments paid (home, auto), charitable donations (cash, non-cash), and miscellaneous expenses.

ADVANCED RETURN TAX DOCUMENTATION

Income

- ❑ Self-Employment Income (i.e. Care 4 Kids, Independent Contractor only have 1 business, <$25,000 in expenses and will not report a net loss) (1099-MISC)
- ❑ 1099-B - Capital Gain or Loss
- ❑ Schedule K-1
- ❑ Cancellation of Credit Card Debt **(Non business related and if taxpayer is solvent immediately before cancelation of debt)**
- ❑ 1099-R Distribution from Retirement Plans (IRA's, Pensions, and Annuities) – **if ☑ box says taxable amount is not determined on the 1099 R. In addition to the tax form, you will also need to bring the documentation of value of the Plan Cost at the annuity start date.**

Other Documentation – Advanced

- ❑ **Forms 1095-A (Must have this document if the insurance was purchased through the Access Health CT)** Affordable Health Care Statement

If you have other income documents (example - Rental Income, Royalties, other gains or losses, Cancelation of Debt (business related cancelation of debt or not insolvent immediately before COD), these are beyond the scope of VITA so we will be unable to complete your return.