

# TAX DOCUMENTS CHECKLIST

*Grayson County Alliance (VITA) Volunteer Income Tax Assistance*

*Free Tax Site--Call for appointment 270-259-4000*

*Site opens Mid January*

**Picture ID for Self and Spouse, check expiration dates REQUIRED**

**Social Security Cards or Individual Tax ID Numbers for EVERYONE on your Tax Return REQUIRED**

## **Income Documentation:**

- W2's
- 1099-INT, 1099-DIV, 1099-R, 1099-MISC
- Unemployment
- Social Security
- Alimony: Divorces Pre 2020
- Sales of Stocks
- Cash Income
- Scholarships

## **Deductions & Expenses**

### **Documentation:**

- Property Taxes
- Home Mortgage Interest
- Medical Expenses
- Charitable Contributions
- Student Loan Interest
- Divorces Pre 2020 Alimony Paid
- Unreimbursed Educators Expense
- Self-Employment Expenses, etc.

## **Documentation for Tax Credits**

- Statement from Child and Dependent Care Provider with Federal Tax ID#
- Proof of Tuition Expenses 1098-T
- Receipts for Energy Efficient Upgrade to Main Home

## **Health Insurance Statement (FORM 1095-A)**

**\* Health Insurance: DID YOU or ANY PERSON ON YOUR TAX RETURN, PURCHASE HEALTH INSURANCE THROUGH KYNECT OR HEALTHCARE.GOV? A copy of the 1095A is REQUIRED to prepare your taxes. Your tax return will reject from the IRS without the 1095A.**

If Possible : A copy of last year's income tax return.

**For Direct Deposit (the fastest and safest way to receive your refund):  
Documentation of personal Checking and/or Savings Accounts numbers  
including Bank Routing Numbers.**

GCA VITA Site sponsored by:  **GRABC**

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