

TAX DOCUMENTS CHECKLIST

Grayson County Alliance VITA Tax Site

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
- Stimulus Payments
- Advance Payments on Child Tax Credits
- 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

- Amount of Stimulus (Economic Impact Payment) Received in 2021
- Amount of Advanced Child Tax Credits Received
- 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 statement needed if insurance was obtained through Kynect or HealthCare.gov for anyone on the Tax Return. The 1095-A is **REQUIRED**.

A copy of last year's income tax return, if you have a copy.

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