

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
Alimony or Maintenance
Sales of Stocks
Cash Income
Scholarships

Documentation for Deductions & Expenses

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

Documentation for Tax Credits

Child and Dependent Care Receipts
Proof of Tuition Expenses 1098-T
Receipts for Energy Efficient Upgrade to Main Home

Health Insurance Statement (1095-A, 1095-B, 1095-C)

* Proof of Health Insurance for everyone on your Tax Return. 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 Bank Accounts with Bank Routing
Numbers