

TAX DOCUMENTS CHECKLIST

*Grayson County Alliance (VITA) Volunteer Income Tax Assistance
Free Tax Site--Call for appointment 270-259-4000
Site opens January 26-April 13, 2026*

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

REQUIRED: Social Security Cards or Individual Tax ID Numbers for **EVERYONE**

REQUIRED: Birthdates for **EVERYONE** listed on return

REQUIRED: For anyone who has received a 4 digit pin (IPPIN) from IRS

Income Documentation:

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

Deductions & Expenses

Documentation:

- Property Taxes
- Home Mortgage Interest (Form 1098)
- Medical Expenses
- Charitable Contributions
- Student Loan Interest
- Divorces Pre 2020 Alimony Paid
- Unreimbursed Educators Expense
- Self-Employment Expenses, etc.

Documentation for Tax Credits

- Childcare Statement--Including amount paid, Provider SS# or Federal Tax ID#
- Education Expenses/Proof of Tuition Expenses 1098-T

Health Insurance Statement (FORM 1095-A)

*** Health Insurance:** DID YOU or ANY PERSON ON YOUR TAX RETURN, PURCHASE HEALTH INSURANCE THROUGH (Marketplace) 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.

***Health Savings Account (HSA) Form 5498-SA**

2025



If you bought a 2025 (NEW) American-made car, SUV, minivan, van, pick-up truck, or motorcycle in 2025, you may deduct the INTEREST you have paid. You MUST have VIN, date of purchase and statement of interest paid on documented form.

Energy Efficiency Home Improvements: Must have a form from the provider with the 4 digit Qualified Manufacturer Identification Number, date, and amount of purchase

NO PAPER CHECKS! For Direct Deposit: Documentation of personal Checking and/or Savings Account numbers including Bank Routing Numbers. If you don't have a bank account GCA will offer a **FREE** Community Financial Resource (CFR) CARD that has no fees if used monthly so you can E-file. If you have used a CFR card in the past please bring it with you.