



VITA 2022 - Required Documents for Tax Filing

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Documents Needed for VITA Tax Preparation:

1. **Photo ID** for you and/or spouse if filing jointly
2. **Social Security Cards or ITIN Letters for every member of your family** (if you do not have a card for every member of your family – you must contact the social security administration to replace card prior to having taxes prepared)
3. **W-2s and/or 1099's from ALL** of your jobs worked in 2021
4. **1099-NEC** (non-employee compensation) – required to complete an accurate tax return – shows taxpayer is considered self-employed
5. **Health Insurance Documents** – If you signed-up for health insurance through the CT Marketplace, you must bring all tax documents that you receive from the Marketplace (if you received form 1095A it is REQUIRED to complete your tax return) – forms 1095A, B or C
6. **Unemployment Compensation** - form 1099G. This form will not be mailed, taxpayers must get from CT Department of Labor themselves (CTDOL.State.ct.us) (800-956-3294)
7. If self-employed, any **related business expenses**
8. **Interest/Dividend statements** from your financial institutions (if applicable)-forms #1099 INT, 1099DIV
9. **Tuition and student loan information** (if applicable) form 1098T or 1098E
10. Documentation from **your daycare provider** (their SSN or EIN) if you paid for child care in 2021
11. If you own a home, your **annual mortgage information**.
12. If you itemized your return last year, your **state of CT refund information (last year's tax return)**
13. A record of any **taxes paid** to the town (property taxes, automobile, etc.)
14. Records of any **charitable donations** that you made (monetary or other)
15. Any **other income** information or **IRS notices** that you received **including Child Tax Credit letter and Stimulus Money letter**
16. **Copy of your last two years' tax returns.**
17. **NOTE:** If you would like to direct deposit, please bring a voided check from your checking account or the account and routing number for your savings account (this will significantly reduce the refund time period)