

## WHAT TO BRING CHECKLIST – TAX YEAR 2025

### IRS Forms

These forms are available for download or pickup at our Volunteer Center. While it is preferred that you complete these forms prior to your in-person appointment, you can arrive 15 minutes early to complete them.

- Form 13614-C** (Intake/Interview and Quality Review Sheet)/**Form 15080** Consent to Disclose Tax Return Information to VITA/TCE Tax Preparation Sites
- Form VITA UWHC Consent Form**
- UWHC State and Additional Information Request**

### Identification (REQUIRED)

- Original documents only — no photocopies
- Photo ID (driver's license, passport) for all filer(s)
- Social Security cards (NOT photos) for you, your spouse, and all dependents. Social Security recipients may use Form 1099-SSA.
- If no SSN, an ITIN is required. UWHC can assist with ITIN creation or renewal

### IRS Letters

- Any correspondence received from the IRS

### Financial Records (as applicable)

- W-2, 1099-MISC, 1099-NEC, 1099-K from all employers
- W-2G Gambling winnings (and record of gambling losses)
- 1099 Forms (as appropriate)
  - 1099-B Brokerage statement
  - 1099-C Cancellation of Debt
  - 1099-G – Unemployment (NJ forms must be downloaded)
  - 1099-INT / 1099-DIV
  - 1099-R Retirement/Pension/Annuity
  - 1099-SSA Social Security
- Total overtime pay statement from employer
- Final paystub of 2025
- Record of estimated tax payments to IRS and/or State
- Copy of 2024 federal and state tax returns (white envelope if 2024 client)

### Additional Federal and NJ Information

- Charitable contributions (total cash and in-kind donations)
- Childcare expenses with provider's EIN/SSN and address
- Identity Protection PIN if you are a victim of Identity Fraud
- Medical expenses (totals of premiums and out-of-pocket expenses)
- Rent – monthly amount

## **Educational Expenses**

- 1098-T Tuition, scholarships and grants
- 1098-E Student loan interest
- Proof of other education expenses

## **Healthcare**

- 1095-A Marketplace health insurance statement
- 1095-B Health coverage statement
- 1095-C Employer provided health insurance statement
- 1099-SA / 5498-SA Health Savings Account contributions / distributions

## **Self-Employed / Cash-Only Earners**

- Business expenses and mileage log
- Total income earned in 2025
- Tip income from tip log or company statements (Uber, Lyft, etc.)

## **Homeowners**

- NJ Property taxes paid - bill or "Green/White card"
- PA County/Township tax and School tax statements
- 1098 Mortgage interest (2 or more if mortgage sold/transferred)
- NJ ANCHOR rebate amount and Senior Freeze amount (if applicable)

## **New Car Loan Interest (if purchased in 2025)**

- Vehicle VIN# (from insurance or registration card)
- Date vehicle was purchased in 2025
- Total car loan interest paid in 2025 (annual/last statement from lender)

## **Direct Deposit**

- Voided check or bank routing number and account number

## **IMPORTANT REMINDER**

Both spouses must be present to electronically file a Married Filing Joint return.