

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
- ☐ **UWHC Consent Form**
- ☐ **Additional Federal and State Information**

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.