

## UWHC VOLUNTEER INCOME TAX ASSISTANCE (VITA)

### WHAT TO BRING CHECKLIST

**Pre-Intake Forms:** If there are questions you cannot answer, that's okay. Please do your best and we will help you when you come in.

- Form 13614-C Intake/Interview & Quality Review Sheet
- Form 14446 Virtual VITA/TCE Taxpayer Consent
- State Tax Return Additional Information
- Additional UWHC Questions
- Client Intake Survey Form

**Identification (REQUIRED):** **NOTE: We need original document, NOT photocopies.**

- Proof of identification (photo ID, passport) for all filer(s). (e.g. driver's license)
- Social Security cards for you, your spouse and ALL dependents listed on tax filing. (*If you do not have a Social Security number, ITIN is required*). NOTE: UWHC can assist in renewing and/or creating an ITIN. Please notify UWHC prior to your intake appointment if this is a needed service.
  - NOTE: Social Security recipients can use their 1099-SSA as proof of SSN.

#### **IRS Letters**

- Any correspondence that you may have received from the IRS

**Financial Records:** Bring ALL IRS TAX Documents you received including but not limited to the following:

- Wage and earning statements (Form W-2, W-2G, 1099-Misc, 1099-NEC) from all employers
- W-2 G Certain Gambling Winnings (if applicable)
- Other 1099 Forms (if applicable)
  - 1099- G Unemployment (if you received unemployment benefits during 2022)  
**NOTE:** 1099-G For NJ, will not be mailed and must be downloaded  
<https://lwdwebpt.dol.state.nj.us/ClaimStatus/claimStatus.htm>
  - 1099-SSA Social Security Benefits (if you received social security benefits in 2022)
  - 1099 INT and DIV
  - 1099-R (Retirement/Pension/Annuity)
  - 1099-B Brokerage statement/Stock Sale statements
  - 1099-C Cancellation of Debt
- A copy of last year's federal and state returns. **NOTE: IF UWHC COMPLETED YOUR FILING FOR LAST YEAR, PLEASE BRING YOUR WHITE ENVELOPE WITH ALL COPIES INSIDE.**
- Final paystub of 2022
- Record of Estimated Tax Payments to IRS or State

QUESTIONS? [taxes@uwhunterdon.org](mailto:taxes@uwhunterdon.org) or (908) 237-1689

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### Additional Federal and NJ Information Needed

- Medical Expenses:** Total of all medical expenses and medical premiums with subtotals by type of service (example: doctor, dentist, prescription, vision, nursing care, and mileage etc.)
- Renters:** Monthly rental payment amount
- Charitable Contributions:** Records of in-kind contributions and total of cash donations
- Childcare:** Tax Identification Number or Employee Identification Number of Provider Address of Provider, AND total paid for services per child
- Identity Protection PIN (if you are a victim of Identity Fraud)

### Educational Expenses

- 1098-T Scholarships and grants
- Proof of education expenses (e.g., print out of bills from Finance Department, book receipts)
- 1098-E Interest paid on student loans

### Healthcare (if applicable)

- Health Insurance Exemption Certificate, if received
- Form 1095-A, Health Insurance Marketplace Statement
- Form 1095-B, Health Coverage (showing minimum essential coverage)
- Form 1095-C, Employer Provided Health Insurance
- 1099-SA & 5498-SA showing your contribution or distribution from your Health Savings Account

### Self-Employed/Cash Only Earners only

- Bring business expenses and mileage log
- Come prepared with the amount you earned this year (based on bank deposits and/or your log)

### Homeowners Only

- NJ Real Estate taxes paid for year bill (preferred) or 'green card' from Tax Collector
- PA County/Township Tax and School Tax (2 separate bills) statements
- 1098- Mortgage Interest Statement
- Homestead Rebate amount (if applicable)
- PTR Frozen Amounts (if applicable)
  
- Property Tax Rebate (aka. NJ Senior Freeze/Blue Book)- if you want us to fill in a portion of it once your return has been completed (If applicable)

### Direct Deposit Information

- Voided check, copy of voided check or proof of your checking and/or savings account routing and account numbers.

**REMINDER: TO FILE TAXES ELECTRONICALLY ON A MARRIED-FILING-JOINT TAX RETURN,  
BOTH SPOUSES MUST BE PRESENT TO SIGN THE REQUIRED FORMS**

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