

Tax Preparation Checklist

It's as easy as 1-2-3!

Use this list to help you get organized to either file your taxes online or in person. **Note: If you're getting free help filing your taxes in person, make sure you bring photo identification for all adults in your household.**

Step 1: Gather your documents

- W-2s** for each job held in 2014
- Social Security Card** or Individual Taxpayer Identification Number letter (ITIN) for you and all dependents
- 1099s** showing other income (unemployment, social security, school loans, state tax refund, gambling winnings, non-employee compensation, miscellaneous income, reported to the IRS)
- 1098s** showing payments you've made (school loan interest, mortgage interest)
- 1095-A** if you received credit from the healthcare.gov marketplace.
- Income/interest statements** received for any savings account/investments
- Bank account numbers:** a voided check or your bank or credit union's routing number and savings or checking account number for your refund to be deposited automatically into your account
- Last year's tax return** (if you have it)

Step 2: Gather additional items to get a larger refund

- Childcare expenses:** name, address, Tax ID or Social Security Number of the child care provider
- Business expenses:** if you're self-employed or have a small business
- College:** loans and/or scholarships received, and bills for technical/community college or university (Forms 1098-T/1098-E)
- Educator expenses** for teaching grades K-12 (school supplies and materials used in class)
- Charitable donations:** list of contributions and amounts, receipts for contributions over \$250
- Vehicles:** vehicle sales tax, personal property tax statement for each car you own, for self-employed or use of car for job: total miles driven for the year and/or total miles driven for work
- Homeowners:** mortgage interest statement (Form 1098), real estate taxes paid, Statement of Property Tax Payable in 2014
- Retirement/IRA:** amount contributed to an IRA and total value as of December 2014

Step 3: File your taxes for FREE at a nearby VITA site or file online

- Call 251-433-4900 or United Way's 2-1-1** to locate a VITA site or for more information (see partner agencies below)
- Access www.gesgc.org/taxes.html** from any computer with internet access

