Help us help you!

DANBURY-VITA TAX PREPARATION CHECKLIST (Tax Year 2022)

For all items which apply to you, please bring the documents listed - for both Taxpayer & Spouse.

	Section 1 -- Identification and Background Information	
	Social Security Card or ITIN	*(Taxpayer, Spouse, Dependents)*
	Driver License, or State-issued photo ID	*(Taxpayer, Spouse)*
	Prior Year Tax Return: Federal & State	*(especially if not prepared by Danbury-VITA in prior yr)*
	Bank - Routing# and Account#	*(for direct deposit)*
	Any IRS notices, or Identity Theft PIN#	

	Section 2 -- Income	
	W-2 forms for Wages, Salaries and Tips	
	1099-NEC, 1099-MISC, Self-employment. If Uber/Door Dash, bring mileage (excl 'commute'). If any out-of-pocket expenses (supplies, training, licenses, taxes), bring $amounts & receipts.	
	SSA-1099 for Social Security, or RRB-1099 for Railroad Retirement	
	1099-R forms for IRAs, Pensions, Annuities -Distributions	*(may need to download from your Fin. Inst.)*
	1099-INT forms for Interest	*(may need to download from your Bank, Fin. Inst.)*
	1099-DIV forms for Dividends	*(may need to download ftom your Financial Institution)*
	1099-B forms for Investments, Cap. Gains/Losses	*(may need to download from your Fin. Inst.)*
	1099-G form for Unemployment	*(you will need to download: ct.gov/drs or: tax.ny.gov)*
	1099-C form for Cancelled Debt	
	Alimony received (pre-2019 divorces):	bring supporting documents
	1099-SA form for Health Savings Account -Distribution	
	1099-Q form for 529 College Savings Plan -Distribution	
	Other Income: Gambling wins (**W-2G**); Partner/Beneficiary (**Sched K-1**)	

	Section 3 -- Expense	
	1095-A form for Marketplace Health Insurance	
	Child & Dependent Care expenses:	Provider statement, incl Provider tax id#.
	1098-T College Tuition/Scholarships:	also College Account statement; Books expense
	1098-E for Student Loan Interest paid	
	Alimony paid (pre-2019 divorces):	bring supporting documents
	5498 (or **W2**) for IRA, Roth, 401K - Contributions	
	5498-SA for 529 College Savings Plan - Contributions	
	Car Tax paid:	Tax receipt (or download) from Town
	Real Estate Taxes paid *(only if Itemizing)*	Tax receipt (or download) from Town
	1098 Mortgage Interest *(only if Itemizing)*	
	Charitable Donations: *(only if Itemizing)*	bring supporting documents
	Medical/Dental expense *(only if Itemizing)*	bring receipts showing payments

	Section 4 -- Life Events in 2022	
	Married, Separated, Divorced, or Spouse died (last 3 yrs):	date occurred
	Sale of Real Estate (House):	**1099-S** form