



**Louisville Metro Community Services
Volunteer Income Tax Assistance Program (VITA)**

List of documents to bring to your appointment

Your 2018 household income must be below \$64,000.

What to bring to the tax site

- A copy of last year's return, if available
- Social Security cards and birth dates for you, your spouse and all dependents you are claiming
- Picture ID for you and your spouse, if filing jointly (Please note this is an IRS requirement to help avoid identity theft.)
- Any letter or notice you received from the IRS
- Your savings and/or checking routing and account numbers, or the routing and account number for your refillable debit card (for direct deposit of your refund). It is important that you have a savings account number if you are interested in being entered in a prize drawing through America Saves.
- All health insurance information you have received regarding your health insurance coverage for 2018 including all 1095 A,B, or C.

Sources of income

- W-2 forms for ALL jobs held in 2018
- 1099 forms, such as Unemployment, Social Security and Self-Employment
- Record of cash payments received in 2018 for work not reported on W-2 forms or 1099 forms
- Pension documents, including records of withdrawals from 401(k) or other pension plans
- Documentation of cancellation of debt
- Records of your contributions to Traditional and Roth IRAs, and Health Savings Accounts
- Records showing any Estimated Tax payments made

For possible deductions and credits

- If you paid for child care, bring documentation listing provider name, address, tax ID# and the amount you paid in 2018
- If you, your spouse or a child attended college, bring your tuition expense statement (1098T), documentation of amount spent on books, supplies and equipment, and college account statement
- Student loan interest statement (1098E)
- Documentation of alimony and child support
- Property taxes paid
- If you are itemizing, bring documentation of out-of-pocket expenses for:
Medical bills paid by you(not reimbursed by your insurance)
Charitable contributions
Mortgage interest and points
Real estate taxes paid

Please bring any other information you think we may need to prepare your return(s) successfully!