



List of Documents to bring for your Louisville Metro Community Services Volunteer Income Tax Assistance Program Appointment.

Your 2016 household income must be below \$64,000.

What to bring to the tax site

- A copy of last year's return - very important this year, as we are using new software and do not have access to prior years' returns.
- 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
- A deposit slip with 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)
- All health Insurance information you have received regarding your health insurance coverage for 2016 including all 1095 A,B, or C.

Sources of income

- W-2 forms for ALL jobs held in 2016
- 1099 forms, such as Unemployment, Social Security and Self-Employment
- Record of cash payments received in 2016 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 2016
- 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, or rental information for NYS credit
- 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
 - Job-related expenses
 - Job-hunting expenses

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