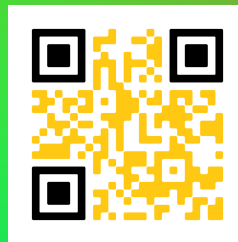


VITA Services at 4Cs of Alameda County



What you Need to Know For Your Appointment

Bring Copies of:

- ☐ Social Security card(s) or Individual Taxpayer Identification Number (ITIN) card(s) or letter(s) for everyone you will list on your return. *Please note: An ITIN is expired if it hasn't been used on a tax return for the last three tax years.*
- ☐ Photo identification: A CLEAR selfie of you holding your VALID AND LEGIBLE photo ID. This requirement applies to both the main tax filer and spouse.
- ☐ Savings and checking account and routing numbers, or a voided check for direct deposit.
- ☐ Income statements, documents, or forms
 - ☐ Wages from each job (W-2)
 - ☐ Interest (1099-INT)
 - ☐ Dividends (1099-DIV)
 - ☐ Retirement Plans (1099-R)
 - ☐ Gambling Winnings (W-2G)
 - ☐ Unemployment (1099-G)
 - ☐ Social Security Benefits (SSA-1099)
 - ☐ Miscellaneous Income (1099-MISC, 1099-NEC, 1099-K)
 - ☐ Sale of Stock (1099-B)
- ☐ Tuition (1098-T) and online detailed student account statement of expenses paid to university/college
- ☐ Health Insurance Information (1095-A, B, or C)
- ☐ If you purchased health coverage through Covered CA, you must also provide Form FTB 3895 Economic Stimulus Letter (Notice 1444-C)
- ☐ Child Tax Credit Payment Letter from IRS (Letter 6419)

Provide, if applicable

- ☐ 2022 Identity Theft PIN Letter from
- ☐ IRS Records of charitable contributions

- ☐ Homeowner mortgage interest (1098) Property tax bill
- ☐ DMV registration form
- ☐ Interest you paid on student loans (1098-E)
- ☐ Childcare or dependent care expenses. Bring total amount paid, provider's business name, address, phone number and SSN or tax ID #
- ☐ If self-employed, provide business income and expenses, to include mileage log.
For Rideshare Drivers: 1099-NEC, 1099-K and on-line tax summary page
- ☐ If you plan to itemize, provide a summary sheet (description and total amount of your expenses).

The Following Situations are Out of Scope for 4Cs VITA Tax Site:

- Married Filing Separately
- If you received a Form W-2 and a Form 1099 from the same business/employer
- Foreclosure/Short Sale
- Kiddie Tax - (Large scholarship amount may be out-of-scope, call to request consultation)
- IRA to Roth Conversions
- Sale of stocks acquired by stock options
- Over 16 stock transactions
- Cryptocurrency without 1099-B form
- Loan Modification
- Out of State Income
- Rental Income
- Self-employment & sole proprietor business with expenses over \$35,000, depreciation, losses, or office in the home
- 1040NR (non-resident alien), except for Foreign Student with Visa F, J, M or Q.
- Expired ITIN holders (should call 211 for VITA sites with Certified Acceptance Agents)

