

What You Need to Bring to CARE Community Tax Center

VITA & TCE — Volunteer Income Tax Assistance / Tax Counseling for the Elderly

Hi there!

We're excited to help you with your tax return. To make your appointment smooth and efficient, please use this checklist and bring **all items that apply to you**.

Identification & Personal Information

- Valid photo ID (state or federal) for the primary taxpayer
- Valid photo ID for spouse (if filing jointly)
- Social Security cards for yourself, your spouse, and all dependents
- ITIN assignment letter (if applicable)

Income & Employment

Please bring **all income documents** for the tax year, including:

- W-2
- W-2G
- 1099-R
- 1099-MISC
- 1099-NEC
- SSA-1099 (Social Security benefits)
- 1099-G (unemployment or state refunds)
- Cash income records
- Prizes or awards documentation
- Self-employment income and expense records (if applicable)

Financial Records

- Interest and dividend statements (Forms 1099)
- Brokerage statements (for example: consolidated 1099 statements from investment accounts)
- Last year's federal and state tax returns (if available)
- Bank account information for direct deposit (such as a voided or blank check)

Family & Childcare Information

If applicable, please bring daycare expense information, including the provider's:

- Name
- Tax ID number (SSN or EIN)

Required Forms & Signatures

- Both spouses present to sign (if filing jointly)
- Completed and signed Form 13614-C (Intake/Interview & Quality Review Sheet)
- Completed and signed Form 14446 (Virtual or In-Person Consent, if applicable)
- Release of Information (ROI) for CharityTracker demographic reporting
- 2026 CARE Community Tax Center Intake Form

Health Insurance

- Form 1095-A (if you or anyone on your return had Marketplace health insurance)

Final Tip

Bringing all required documents helps us prepare your return accurately and reduces delays or follow-up visits.