

# 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**.

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### 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)
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### 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)
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### 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)
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### Family & Childcare Information

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

- ☐ Name
  - ☐ Tax ID number (SSN or EIN)
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## 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
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## Health Insurance

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

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