

# What to bring to your Free File tax appointment:

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## 1. Tax Documents

Avoid multiple trips by bringing your important papers and information when you meet with your tax preparer.

- **Photo ID** for all adults on return
- **Social Security card** or verification letter, or Individual Taxpayer Identification Number (ITIN) assignment letter, for everyone to be listed on tax return
- **Date of birth** for every individual to be listed on tax return
- All wage and earning statements, for example: **W-2 forms** Social Security Income (**SSI**), **pensions**, **annuities**, **unemployment** compensation, etc.
- Any **1099 forms** for other income and interest received during tax year
- **Child care provider** name, address, and tax ID number or SSN, and amount paid during tax year
- **Copy of last year's** state and federal tax returns
- If you are itemizing your deductions, please bring a summary listing of your deductions and supporting details/**receipts**
- Any college tuition **receipts**, **financial aid** or **student loan statements**
- Other applicable tax-related documents, such as: **interest statements**, **federal loan documents**, **retirement statements**, **list of organization to which you made charitable donations**, etc.
- Any letters, **correspondence**, or other documents sent to you by the IRS or your state tax administration
- **Forms 1095-A**, Affordable Health Care Statement

## 2. Account Information

Bring your bank or credit union account information so you can easily deposit your refund and use some of your refund for savings.

- Bank, credit union, or prepaid card **account number and routing number**
- **Or** a voided check