

Durango - La Plata VITA

What to bring:

- **Last year's tax return! If filing jointly both taxpayer and spouse must be present!**
- All tax documents for tax year 2022
 - **Income**
 - W-2, W-2G
 - 1099-R, 1099-INT, 1099-DIV, 1099-B or consolidated brokerage statement
 - 1099-G (state refund or unemployment income)
 - Documents for self-employment(SCH C)
 - Documents for rental income(SCH E)
 - 1099-S (Sale of home)
 - 1099-MISC
 - Oil & Gas Royalties(also: DR-0021W if well is in CO)
 - Self employment
 - **Deductions and Adjustments**
 - Schedule A, if applicable
 - Medical expenses and insurance premiums
 - 1098 mortgage
 - Real estate taxes PAID IN 2022
 - Charitable contributions
 - Auto registration (CO owners tax)
 - 1099-SA, 5498-SA for HSA
 - IRA contributions
 - Educator expenses
 - **Miscellaneous**
 - 1098-T for education credit
 - **1095-A for marketplace insurance (Affordable Care Act)**
 - Child Day Care expenses and facility EIN
 - Long Term Care annual statement for CO tax credit
 - For direct deposit, a check from the account(checking or savings)

IMPORTANT

- You **MUST** bring a **valid** government issued picture ID (i.e. -DL, state ID or US passport) for both taxpayer and spouse.
- You **MUST** have proof of SSN for each person(including dependents) on the return. Your SS card or SSA-1099 are the only documents accepted. Copies are acceptable.

Failure to have the above credentials when you arrive may result in losing your appointment. And, there is no guarantee that we can provide you another appointment.