



VIRTUAL VITA CHECKLIST

Personal Information

- Completed Form 13614-C**
- Completed Form 14446**
- Your Social Security number card or ITIN letter
- Your spouse's full name and Social Security card or ITIN letter number or tax ID number
- Your and your spouse's date of birth (month, day, year)
- Dependent(s) date(s) of birth and Social Security card or ITIN letter

Sources of Income - provide all that apply

Employed

- Form(s) W-2
- Income of other adults in your household

Unemployed

- Unemployment, state tax refund (1099-G)

Self-Employed

- Forms 1099, Schedules K-1, income records to verify amounts not reported on 1099s
- Records of work-related expenses – please fill out and upload your expense form:
<https://bit.ly/3bcALTV>
- Record of estimated tax payments made (Form 1040-ES)

Retirement Income

- Pension/IRA/annuity income (1099-R)
- Traditional IRA basis (contributions to the IRA that were already taxed)
- Social Security/RRB income (1099-SSA, RRB-1099)

Savings & Investments or Dividends

- Interest, dividend income (1099-INT, 1099-OID, 1099-DIV)
- Income from sales of stock or other property (1099-B, 1099-S)
- Acquisition dates and records of cost or other basis in property you sold (if not reported on 1099-B)
- Health Savings Account and long-term care reimbursements (1099-SA or 1099-LTC)
- Expenses related to your investments
- Record of estimated tax payments made (Form 1040-ES)

Other Income & Losses

- Gambling income (W-2G or records showing income, as well as expense records)
- Jury duty records
- Hobby income and expenses
- Prizes and awards
- Royalty Income 1099-Misc.
- Any other 1099s received
- Record of alimony paid/received; ex-spouse's name and Social Security number



Types of Deductions Home Ownership

- Forms 1098 or other mortgage interest statements
- Real estate and personal property tax records
- Receipts for energy-saving home improvements (e.g., solar panels, solar water heater)
- All other 1098 series forms

Charitable Donations

- Cash amounts donated to houses of worship, schools, other charitable organizations
- Records of non-cash charitable donations
- Miles driven for charitable or medical purposes

Medical Expenses – do not include expenses paid through a flexible spending account at work

- Amounts paid for healthcare insurance and to doctors, dentists, hospitals

Health Insurance

- Form 1095-A* if you enrolled in an insurance plan through the Marketplace/Exchange
- *Mandatory: refunds will not be processed unless you include this form

Childcare Expenses

- Fees paid to a licensed day care or family day care for care of an infant or preschooler
- Childcare records (including the provider's tax ID number) if applicable
- Wages paid to a baby-sitter

Educational Expenses

- Forms 1098-T from educational institutions
- Receipts that itemize qualified educational expenses
- Records of any scholarships or fellowships you received
- Form 1098-E if you paid student loan interest

Educator Expenses

- Receipts for classroom expenses (for educators in grades K-12)

State & Local Taxes

- State/local income tax paid (other than wage withholding) or state and local sales tax paid
- Property or real estate taxes

Retirement & Other Savings

- Form 5498-SA showing HSA contributions
- Form 5498 showing IRA contributions

Banking Information

- Routing and account number (so IRS can deposit your refund)