

Social Development Commission

VITA PRE-FILING CHECKLIST

This information will help you avoid filing and processing delays. If you do not have all the necessary documentation, we will not be able to prepare your income tax return today.

You will be required to return when you have all necessary documentation. If you are married and filing a joint return, both you and your spouse must be present during

Quality Review and closeout.

- Valid photo identification (self and spouse)
- Social security cards or Individual Taxpayer Identification Number (ITIN), and birth dates for you, your spouse, and dependents
- Last's year's federal and state tax returns
- Income documents you received during the year:
 - Wage statements (W-2, 1099's)
 - Interest and dividend statements (1099-INT, 1099-DIV)
 - Retirement statements (1099R)
 - Social Security statements (SSA-1099)
 - Unemployment compensation (1099G)
- College tuition paid (1098T) and student loan interest Paid (1098E) and expense (detail account statement from University)
- Contributions to Wisconsin EdVest or Tomorrow's Scholar Account
- Alimony paid or received
- Property Tax Paid Receipt (If itemizing)
- Childcare expenses with provider's address, telephone number and Social Security Number or Employer Identification Number (EIN)
- Proof of healthcare insurance (1095-A, B or C statements) or exemption certificate
- Proof of bank account and routing information or a blank check
- IRS or Wisconsin Department of Revenue notices
- IPIN** – If anyone on return has been subjected to Identity Theft

If you are claiming Wisconsin Homestead Credit, you must also provide the following:

- Copy of filing year detail property tax bill, completed rent certificate without any errors, signed by your landlord or acceptable receipts for rent paid each month during the tax year. **The State will not accept handwritten rent receipts, checkbook receipts or copies of bank statements.**
- Printout of any Wisconsin Works (W-2), Child Support, and Kindship (Call 414-273-1262 for printout) payments received during tax year
- Federal Social Security benefits, federal and state SSI annual benefit printout.
- Proof of earned income if both you and your spouse are under age 62 and not disabled
- Proof of disability (if under age 62):
 - Statement from Veteran's Administration certifying that claimant is receiving disability benefit due to 100% disability, or
 - Document from Social Security Administration stating date disability began, or
 - Statement from physician stating beginning date of disability and whether disability is permanent or temporary

****VITA will not accept any faxes for income verification****

HOMESTEAD CREDIT

The Homestead Credit program is designed to soften the impact of property taxes and rent on persons with lower incomes. The benefit available may be an income tax credit or a direct refund. The credit is based on your household income and allowable property taxes and/or rent for the calendar year.

You may claim homestead credit if:

1. You are 18 years of age or older at the end of the year
2. Must be a legal resident of Wisconsin for the entire year (January 1 – December 31st)
3. You meet on the following conditions:
 - a. You have earned income during the tax year
 - b. You (or your spouse) are disabled
 - c. You (or your spouse) are 62 years of age or older at the end of the year
4. You occupied and owned or rented during the year a home, apartment, or other dwelling that is subject to Wisconsin property taxes
5. You are a legal resident of Wisconsin all year
6. Your household income was less than \$24,680
7. You cannot be claimed as a dependent for the year on someone else's federal income tax return (this qualification does not apply if you are 62 years of age or older at the end of the year)
8. You (and your spouse) will not claim farmland preservation credit for the same year, or the veterans and surviving spouse's property tax credit based on the same property taxes.