

GATEWAY EITC COMMUNITY COALITION

WHAT YOU NEED TO BRING TO YOUR TAX APPOINTMENT

- All income statements, such as W-2's, 1099's, Schedules K-1, Proof of unemployment compensation
 - Social Security Cards or Individual Taxpayer Identification Numbers (ITIN) for all those listed on the tax return
 - Valid picture ID for taxpayer and spouse (Driver's License, State ID, Passport)
 - Copy of prior year tax return (when possible)
 - Bank account and routing numbers for direct deposit
 - Intake form - received in the mail, or can be found on our website www.gatewayeitc.org
- ALL TAXPAYERS
- Proof of child care expenses
 - 1098 mortgage interest and/or real estate tax receipt
 - 1098-E student loan interest
 - Forms 1098-T from educational institutions
 - Form 1095-A (proof of health insurance from Marketplace)
 - Form 5498-SA showing HSA contributions
 - Form 1099-SA showing HSA distributions
 - Notice 1444, Your Economic Impact Payment
 - Parcel number (Illinois homeowners only)
 - Anything else that says "Important Tax Document"
 - If married filing jointly – both spouses must be present to sign
- WHEN APPLICABLE

Every taxpayer's situation is unique. It is impossible to list all the items one must bring in for a tax appointment for every type of tax situation. When in doubt, bring the item in.

Appointments are restricted to one person if filing single, two for couples filing a joint return.

Restrictions and closures will likely happen during the season.

Please check our website, www.gatewayeitc.org, or call 314-539-4062 for up-to-date information on the day of your appointment.

Thank you for your understanding and flexibility.