

Tax Preparation Checklist

This is just a general list of documents that can make the process of filing your taxes easier. You may want to get a folder or other container to put these documents in as you cross them off the list.

Personal Information

- Photo ID
- Social Security cards (or ITIN letters of assignment) for you, your spouse, your dependents
- Dates of birth for you, your spouse, your dependents
- Copies of last year's return for you and your spouse (helpful, but not required, unless using new online software)
- Bank account number(s) and routing number(s) for direct deposit (you can deposit to more than one account, such as both a checking and a savings account)

Information about your income

- W-2 forms for you and your spouse
- 1099-G forms for unemployment income
- SSA-1099 for Social Security Benefits received
- Alimony Received
- Miscellaneous income: jury duty, gambling winnings, etc.
- Any other 1099 Forms you may have received

Health Insurance Documents

- 1095-A Form if you received your insurance through the Marketplace
- 1095-B or 1095-C if your health coverage was through an employer or other source
- ECN Certificate if you received a health insurance exemption from the Marketplace

Back-up Information

- Alimony paid
- Form 1098-E if you made any payments on student loans (or loan statements)
- Form 1098-T if you paid any post-high school tuition (or receipts/cancelled checks)
- Any other 1098 Forms you may have received
- Child care costs: provider's name, address, Tax ID, amount paid during 2015

If you itemize your deductions (deductions and credits)

- Charitable donations: cash amounts, official charity receipts, canceled checks, value of donated property
- Medical and dental expense records
- Miscellaneous deductions: union dues, unreimbursed employee expenses (uniforms, supplies, etc.) Receipts/cancelled checks, other records
- Property Taxes
- Mortgage Interest

For more information on Free Tax Preparation Sites in Whatcom County, please visit:

www.whatcomabc.org/taxes

2017 Whatcom County Free IRS Certified Tax Preparation Sites



AARP Tax-Aide Sites

Provide free basic and limited complex income tax return preparation with electronic filing to all individuals including past year return

Bellingham Public Library, 210 Central Ave.

Dates: Jan. 23 through April 18

Mondays – Thursdays 4:00 p.m. - 7:00 pm - *Closed Mon Feb. 20*

Saturdays 1:00 p.m. to 4:00 p.m.

No Appointment Needed

Spanish translation will be available on certain days - TBD

Bellingham Senior Activity Center, 315 Halleck St.

Dates: Feb 1 – April 14

Wednesday 9:00am – 3:00pm

Fridays 9:00am – 3:00pm

Appointment only, Call 360-733-4030, then 2, then 2

Volunteer Income Tax Assistance (VITA) Sites

Provide free basic income tax return preparation with electronic filing to households making less than \$53,000/year.

Western Washington University, Parks Hall, Room 336

Dates: Feb. 6 through April 17 - *Closed Mon Feb. 20 and March 18 - 27*

Monday – Wednesday 4:30pm – 8:30pm

Walk-in only

Free Parking in WWU's "C" lots after 4:30pm on weekdays

Whatcom Community College, 237 West Kellogg Rd - Heiner Library Classroom #201B

Dates: Feb. 13 through April 17 - *Closed Mon Feb 20 and March 25 – April 3*

Mondays 5:00 pm - 8:00 pm

Fridays 9:00 a.m. to 12:00 p.m. and 1:00 p.m. - 3:00 pm

Walk-in only

Facilitated Self Assistance (FSA) Sites

Provide free, easy to use online software for households making less than \$64,000/year, who would like to prepare their own taxes at any computer with Internet access. To access filing software go to www.myfreetaxes.com. Assistance is available at the Opportunity Council & East Whatcom Regional Resource Center FSA sites.

Opportunity Council - Bellingham

1111 Cornwall Avenue, Conference Room

Dates: Jan. 20 through April 18

**Closed Mon Feb. 20*

Appointment required, call 360-734-5121 x253

Opportunity Council – Maple Falls (East Whatcom Regional Resource Center)

8251 Kendall Road

Dates: Tuesday February 21 – 4:00pm to 7:00pm

Saturday March 11 & April 8 - 10:30am to 1:30pm

Walk in or Appointment, call 360-734-5121 x253