

2009 Income Tax Assistance Document Checklist

Taxpayers must bring the following documents to any free tax assistance site. If they do not bring these items with them, their returns may not be able to be completed and filed.

- Valid Photo ID (Driver's License, State ID, Military ID, Passport, Student ID)
- **Original** Social Security Card for you, your spouse and **all** dependents **or** a letter from the Social Security office verifying your SS number and those whose cards you do not have.
- Verification of birth dates for anyone listed on the tax return (State ID, Driver's License, Birth Certificate for children).
- Copy of your 2007 Federal and State income tax returns (if available and complete).
- Income documentation:
 - W-2 Forms from all jobs worked in 2008
 - All 1099 forms you may have received
- Bank Routing Transit Number and bank account number for direct deposit of your refund. Bring either a blank check or verification from the bank of the transit number for your savings account and/or checking account.

Other Documents to Bring If They Pertain to the Taxpayer:

- Child care expenses, including the provider's name, address and federal ID tax number of the care giver.
- If renting, total amount of rent paid and landlord's name, address and Hawaii State Tax number.
- Unemployment benefits verification.
- Social Security benefits statement.
- Mortgage statements, property tax bills.
- College tuition, award letters, student loan interest statement.
- Alimony paid or received.
- Child Support paid or received.
- Adoption expenses.
- Prizes, awards, lottery/gambling winnings (W-2G forms).
- Documentation of Union Dues Paid.
- Donations made (documentation from the agency/foundation who receive the donation and the amount of the donation).
- Economic Stimulus Payment amount if you received the payment in 2008.

IN SHORT, PLEASE BRING ALL DOCUMENTS THAT HAVE TO DO WITH ANY MONEY THAT THE TAXPAYER RECEIVED OR PAID OUT DURING THE YEAR.