CAPSTONE
COMMUNITY ACTION

VITA Tax Preparation Program Overview

Capstone offers a free tax return preparation service in partnership with the IRS, provided by IRS-trained and certified volunteer tax preparers. All tax preparation is by appointment only.

To make an appointment please call our **dedicated Tax Line**: **802-477-5148**.
All appointments for our four sites – Barre, Morrisville, Randolph, and Waitsfield - are scheduled through this number.

1. To prepare for your appointment, please be sure to gather the following and bring it with you:
    - ✓ **Photo ID** for yourself, and spouse if married filing jointly
    - ✓ **Social Security CARDS** for you (your spouse and dependents, if applicable). If you already receive Social Security you do not need the Card – just bring your annual social security statement that came in the mail.
    - ✓ **ALL tax documents that apply to your situation** – this varies depending on your reason for filing and sources of income. It typically includes W-2's from jobs and all 1099 type forms. (See next page)
    - ✓ If you are a homeowner, you will need your current **property tax BILL** so we can file your Home Declaration and Property Tax Credit.

2. Please arrive a few minutes before your appointment time to fill out the front of the two forms from Capstone and the IRS which we need to prepare your return.

3. You will meet with a VITA tax volunteer who will review the items listed in the forms and temporarily retain your documents while they prepare the return. This appointment lasts about a half hour.

4. Your return will be prepared remotely. This process often takes a week or two. You will be called when has been completed.

5. You (and your spouse, if filing jointly) will return to Capstone to review the finished tax return during specific days and times determined by prep site.
    - ✓ The returns will **not** be e-filed until you have **signed** them.
    - ✓ You will be given a copy of your tax returns and all the supporting tax documents you provided will be returned to you.

SUPPORTING DOCUMENTS

Everyone needs to bring to their first appointment:

☐ **Photo ID** for yourself, and spouse if married filing jointly

☐ **Social Security Card** for yourself, spouse, and dependents, if applicable (or ITIN if applicable).

→ **IF you receive Social Security and have a 1099-SSA statement, you do not need the card.**

Bring all sources of income and tax documents that pertain to you:

- This will vary depending on your particular circumstances and reason for filing.
- Use the list below to determine what you, *and your spouse if married filing jointly,* may need to bring.
- You may want to check off items as you gather them. Missing documents will hold up the process.
- The description is followed by the **form number in bold**.

Common Sources of Income:

☐ Wage statement from ALL employers (**W-2**); not pay stubs

☐ Interest and Dividend Statements from banks/ investments (**1099-INT, 1099-DIV, 1099-B**)

☐ Social Security annual statement (**1099-SSA**)

☐ Retirement distribution statements from retirement accounts, IRAs, and Pensions (**1099-R**)

☐ Self-employment income (if applicable) – **tallied** & **itemized** record of gross receipts & expenses

☐ Any and all other income statements you received, such as -

- unemployment compensation; both Federal & State are reported (**1099-G**)
- cancellation of debt (**1099-C**)
- gambling winnings (**W2-G**)
- miscellaneous non-employee income (**1099-MISC**)
- independent contractor (**1009-NEC**)
- third party payments **(1099-K)** (may include Venmo, PayPal or others)

Other Supporting Documents:

☐ **Health Insurance** - If you had health insurance through **Vermont Health Connect** bring the statement (**1095-A). This is required** if you had health insurance from VHC, and it was not Medicaid.

- If you had Employer or other-based health insurance form **(1095-B/C)** or no insurance, you do not need to bring forms, but you can.

☐ **Bank routing** number; **savings** and/or **checking account** numbers; required if electing direct deposit

☐ Statement from registered **daycare provider**, if applicable

☐ Tuition Statement (**1098-T**), if applicable

☐ Student Loan Interest paid (**1098-E**), if applicable

☐ **Property Tax Bill** (current year) if you own a home. Call your Town Clerk for a copy if you don't have the bill. Also needed: all other taxable and non-taxable income such as VA benefits.

1. **SSI/SSDI** - Bring monthly or annual information for yourself and spouse (if applicable).
2. Bring all income and Social Security numbers for other adults in household (if applicable).

***** Renters Please Note**: Landlord Certificates are no longer required except for mobile home lot rent.