IMPORTANT TAX PREP INFO—PLEASE READ

You are receiving this packet because you made an appointment (see envelope) to have your income tax returns prepared through Capstone's VITA Tax Program. The process involves two, brief in-person appointments with you and remote work by the VITA volunteer. If you need to cancel or reschedule, please call the Tax Line: 802-477-5148.

Steps in the process:

- **Before your appointment**, please be sure you have received all necessary tax statements and documents. **Fill out the two enclosed forms as best you can**: IRS Form 13614-C (Interview/Intake & Quality Review Sheet) & **Capstone Intake form**.

- Be sure to arrive promptly for your appointment with all the required papers. You will need to bring:
  - Photo ID for yourself, and spouse if married filing jointly
  - Social Security CARDS for you (your spouse and dependents, if applicable)
  - Both completed intake forms - the enclosed IRS and Capstone forms
  - ALL tax documents that apply to your situation - See other side

- During your appointment, you will meet with a VITA Tax Volunteer who will review your ID, collect your paperwork, and ask some additional questions related to preparing your tax returns. It should take about 20 minutes or so.

- After you leave, preparing your returns may take about two weeks:
  - A VITA volunteer will prepare your returns remotely. They will contact you by phone or email if they have questions. Please be sure to respond.
  - A second volunteer will review the prepared returns for accuracy.

- When your returns are ready, a volunteer will contact you. You (and your spouse if filing jointly) will be asked to come again in-person to sign your returns.
  - 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 documents you provided will be returned to you.

DO NOT MAIL any tax forms or other tax materials to Capstone.
A MASK is encouraged when you come to Capstone.
Please do not come if sick.
List of Tax Prep 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 -
  o unemployment compensation; both Federal & State are reported (1099-G)
  o cancellation of debt (1099-C)
  o gambling winnings (W2-G)
  o miscellaneous non-employee income (1099-MISC)
  o independent contractor (1099-NEC)
  o third party payments (1099-K) (may include Venmo, PayPal or others)

Other Supporting Documents:

☐ Health Insurance - If you had any health insurance in 2023, bring the provider’s annual statement:
  o Vermont Health Connect statement (1095-A) required if you had health insurance from VHC.
  o Employer or other-based health insurance form (1095-B/C); bring if available.
  o If you did not have health insurance in 2023, you don’t need to bring any health ins. forms.

☐ Bank routing number; savings and/or checking account numbers; only 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 (for 2023-2024) if you own a home. Call your Town Clerk if you don’t have the bill.
  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.
Capstone VITA Intake  
Tax Year: 2023

Taxpayer Name: ________________________________  □ M  □ F  □ NB

Spouse’s Name if married: ________________________________  □ M  □ F  □ NB

Phone Number (10 digit) ________________________________  □ Cell  □ Landline

Ok to leave voice message?  □ Yes  □ No  →  If cell phone, OK to text a message?  □ Yes  □ No

Is it OK to E-mail if we have questions or to let you know your return is done?  □ Yes  □ No

If yes, email address (write clearly): ________________________________

Living Address:  Street ________________________________  Apt. __________________

               Town* ________________________________  ST _______  Zip _______

* If you live in Barre – please indicate City or Town

Mailing Address:  □ Same as living address  □ Different - enter mailing address on lines below

________________________________________________________________________

Please answer the following questions for demographic purposes. This information is not shared.

Race:  □ White  □ African/American  □ Asian  □ American Indian  □ Pacific Island  □ Bi-racial.

Are you Hispanic?  □ Yes  □ No

Are you Disabled?  □ Yes  □ No

Military Status:  □ Never in military  □ Veteran  □ Active Military

Do you receive Food Stamps / EBT / SNAP?  □ Yes  □ No

Do you have health insurance?  □ Yes  □ No

Highest Level of Education:  □ up to 8th grade  □ some high school  □ high school diploma or GED

        □ some college  □ Associate’s degree  □ Bachelor’s degree  □ Graduate studies/degree

Employment Status:  □ work full time  □ work part time  □ retired  □ not in labor force, not retired

        □ currently unemployed, looking for work  □ self-employed

HOMEOWNERS: Do you want to file a Homestead Declaration?  □ Yes*  □ No

* If yes, bring your Property Tax BILL for 2023-2024. Contact your Town Clerk for a copy if you don’t have one.

RENTERS: Do you want to apply for the VT Renter Credit?  □ Yes*  □ No

* If yes, how many total months did you rent in 2023? __________

Direct Deposit Information:  Fill in bank info only if you want any refund electronically deposited.

How do you want to receive any refund?  □ Paper Check  □ Direct Deposit (fill out below)

Bank #1 ________________________________  Bank #2 ________________________________

Type of account:  □ Checking  □ Saving

Routing number ________________________________  Routing number ________________________________

Account number ________________________________  Account number ________________________________

Initial here to certify this is your acct. ______  Initial here to certify this is your acct. ______
To be completed by a Certified Volunteer Preparer

If additional space is needed check here and list on page 3.

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2. If your spouse died prior to 1984, check Yes. Otherwise, check No. If Yes, check Widowed, Legally Separated, Divorced, or Married. If Married, was your marriage status? Check Yes or No.

3. Did you live with your spouse during any part of the last six months of 2023? Check Yes or No.

4. You are not required to file a joint return if your spouse die on January 1, 2023, or after December 31, 2022. You must, however, file a joint return if you are required to file a joint return for the year in which your spouse died.

5. Married taxpayers may file joint returns even if one spouse has died. You must file a joint return if you are married on December 31, 2023, and your spouse died on January 1, 2023, or after January 1, 2023.

6. Last year, did you file a joint return with your spouse? Check Yes or No.

7. Your spouse's date of birth. If your spouse was born before you were born, check Yes. Otherwise, check No.

8. Full-time student? Check Yes or No.

9. Your spouse was permanently disabled? Check Yes or No.

10. Can anyone claim you as a dependent? Check Yes or No.

11. Have you or your spouse earned or received any income from an identifiable trade or business? Check Yes or No.

12. Provide an email address (optional). This email address will not be used for contacts from the Internal Revenue Service.

13. Other income information (if you are filing a joint return, enter your names in the same order as last year's return).

Part 1 - Personal Information

1. Your first name. Last name.
2. Your spouse's first name. Last name.
5. Last year, were you or your spouse a full-time student?
6. Last year, did you or your spouse have a disability?
7. Last year, were you or your spouse a full-time student?
8. Did you or your spouse have a disability?
9. Can anyone claim you or your spouse as a dependent?
10. Did you file a joint return with your spouse?
11. Did you earn any income from an identifiable trade or business?

Part 2 - Tax Information

2. Employer Identification number. Your employer Identification number.
3. Tax identification number. Your tax identification number.
4. Any other number used to report federal tax returns to the IRS.

Part 3 - Federal Tax Information

2. State tax identification number. Your state tax identification number.
3. Local tax identification number. Your local tax identification number.

Part 4 - Other Information

1. Your full name. Your spouse's full name.
5. Your state tax identification number. Your spouse's state tax identification number.

Part 5 - Certification

I, the undersigned, affirm that the information provided is true, complete, and correct. I understand that false or misleading statements may result in penalties under Federal law.

[Signature]
[Name]
[Date]

OMB Number 1545-1944

Department of the Treasury - Internal Revenue Service
Check appropriate box for each question in each section

**Part III – Income – Last Year, Did You (or Your Spouse) Receive**

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1. (B) Wages or Salary? (Form W-2) If yes, how many jobs did you have last year?

2. (A) Tip Income?

3. (B) Scholarships? (Forms W-2, 1098-T)

4. (B) Interest/Dividends from: checking/savings accounts, bonds, CDs, brokerage? (Forms 1099-INT, 1099-DIV)

5. (B) Refund of state/local income taxes? (Form 1099-G)

6. (B) Alimony income or separate maintenance payments?

7. (A) Self-Employment income? (Forms 1099-MISC, 1099-NEC, 1099-K, cash, digital assets; or other property or services)

8. (A) Cash/check/digital assets, or other property or services for any work performed not reported on Forms W-2 or 1099?

9. (A) Income (or loss) from the sale or exchange of stocks, bonds, digital assets or real estate? (including your home) (Forms 1099-S, 1099-B)

10. (B) Disability income? (such as payments from insurance, or workers compensation) (Forms 1099-R, W-2)

11. (A) Retirement income or payments from pensions, annuities, and or IRA? (Form 1099-R)

12. (B) Unemployment Compensation? (Form 1099-G)

13. (B) Social Security or Railroad Retirement Benefits? (Forms SSA-1099, RRB-1099)

14. (M) Income (or loss) from rental property?

15. (B) Other income? (gambling, lottery, prizes, awards, jury duty, digital assets, Sch K-1, royalties, foreign income, etc.)

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**Part IV – Expenses – Last Year, Did You (or Your Spouse) Pay**

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1. (B) Alimony or separate maintenance payments? If yes, do you have the recipient’s SSN?

2. Contributions or repayments to a retirement account?
   - ☐ IRA (A)
   - ☐ Roth IRA (B)
   - ☐ 401K (B)
   - ☐ Other

3. (B) College or post secondary educational expenses for yourself, spouse or dependents? (Form 1098-T)

4. Any of the following?
   - ☐ (A) Medical & Dental (including insurance premiums)
   - ☐ (A) Taxes (State, Real Estate, Personal Property, Sales)
   - ☐ (A) Mortgage Interest (Form 1098)
   - ☐ (B) Charitable Contributions

5. (B) Child or dependent care expenses such as daycare?

6. (B) For supplies used as an eligible educator such as a teacher, teacher’s aide, counselor, etc.?

7. (A) Expenses related to self-employment income or any other income you received?

8. (B) Student loan interest? (Form 1098-E)

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**Part V – Life Events – Last Year, Did You (or Your Spouse)**

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1. (A) Have a Health Savings Account? (Forms 5498-SA, 1099-SA, W-2 with code W in box 12)

2. (A) Have credit card, student loan or mortgage debt cancelled/forgiven by a lender or have a home foreclosure? (Forms 1099-C, 1099-A)

3. (A) Adopt a child?

4. (B) Have Earned Income Credit, Child Tax Credit or American Opportunity Credit disallowed in a prior year? If yes, for which tax year?

5. (A) Purchase and install energy-efficient home items? (such as windows, furnace, insulation, etc.)

6. (A) Receive the First Time Homebuyers Credit in 2008?

7. (B) Make estimated tax payments or apply last year’s refund to this year’s tax? If so how much?

8. (A) File a federal return last year containing a “capital loss carryover” on Form 1040 Schedule D?

9. (A) Have health coverage through the Marketplace (Exchange)? [Provide Form 1095-A]
Form 15080 (October 2023)

Department of the Treasury - Internal Revenue Service

Consent to Disclose Tax Return Information to VITA/TCE Tax Preparation Sites

Federal Disclosure:
Federal law requires this consent form be provided to you. Unless authorized by law, we cannot disclose your tax return information to third parties for purposes other than the preparation and filing of your tax return without your consent. If you consent to the disclosure of your tax return information, Federal law may not protect your tax return information from further use or distribution.

You are not required to complete this form to engage our tax return preparation services. If we obtain your signature on this form by conditioning our tax return preparation services on your consent, your consent will not be valid. If you agree to the disclosure of your tax return information, your consent is valid for the amount of time that you specify. If you do not specify the duration of your consent, your consent is valid for one year from the date of signature.

Terms:
Global Carry Forward of data allows TaxSlayer LLC, the provider of the VITA/TCE tax software, to make your tax return information available to ANY volunteer site participating in the IRS's VITA/TCE program that you select to prepare a tax return in the next filing season. This means you will be able to visit any volunteer site using TaxSlayer next year and have your tax return populate with your current year data, regardless of where you filed your tax return this year. This consent is valid through November 30, 2025.

The tax return information that will be disclosed includes, but is not limited to, demographic, financial and other personally identifiable information, about you, your tax return and your sources of income, which was input into the tax preparation software for the purpose of preparing your tax return. This information includes your name, address, date of birth, phone number, SSN, filing status, occupation, employer's name and address, and the amounts and sources of income, deductions and credits that were claimed on, or contained within, your tax return. The tax return information that will be disclosed also includes the name, SSN, date of birth, and relationship of any dependents that were claimed on your tax return.

You do not need to provide consent for the VITA/TCE partner preparing your tax return this year. Global Carry Forward will assist you only if you visit a different VITA or TCE partner next year that uses TaxSlayer. You have the right to receive a signed copy of this form.

Limitation on the Duration of Consent: I/we, the taxpayer, do not wish to limit the duration of the consent of the disclosure of tax return information to a date earlier than presented above (November 30, 2025). If I/we wish to limit the duration of the consent of the disclosure to an earlier date, I/we will deny consent.

Limitation on the Scope of Disclosure: I/we, the taxpayer, do not wish to limit the scope of the disclosure of tax return information further than presented above. If I/we wish to limit the scope of the disclosure of tax return information further than presented above, I/we will deny consent.

Consent:
I/we, the taxpayer, have read the above information.
I/we hereby consent to the disclosure of tax return information described in the Global Carry Forward terms above and allow the tax return preparer to enter a PIN in the tax preparation software on my behalf to verify that I/we consent to the terms of this disclosure.

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If you believe your tax return information has been disclosed or used improperly in a manner unauthorized by law or without your permission, you may contact the Treasury Inspector General for Tax Administration (TIGTA) by telephone at 1-800-366-4484. Report a Crime or IRS Employee Misconduct - U.S. Treasury Inspector General for Tax Administration (TIGTA) (https://www.tigta.gov/reportcrime-misconduct).