Hello! **Capstone TAX LINE: 802-477-5148**

Please read this letter. It outlines the process for getting your taxes done through the VITA Tax Program at Capstone this year. EVERYONE MUST HAVE AN APPOINTMENT (no walk-ins).

Due to Covid-19, we have had to change our procedures. We have tried to plan for a smooth and efficient process primarily working remotely with minimal in-person contact. We appreciate your understanding.

1. The first step is to fill out the two "intake" forms.

- An **IRS Form 13614-C** (Interview/Intake and Quality Review Sheet). Please fill out all three pages as best you can, including the "optional" demographic questions at the end. On page 2, mark the unsure box if you don't know whether or not something pertains to you.
- A **Capstone Intake** form. Please fill out all information requested and sign.

2. The second step is to gather all your tax-related documents.

- On the back of this paper, you will find a **list of tax-related items** you may need. Please read it carefully and collect all the items that pertain to your situation, checking off each one as you gather it.

3. The third step is to call for a tax "interview" appointment.

- **Please fill out the two forms and gather ALL your tax documents BEFORE you call.**
- **Capstone TAX LINE: 802-477-5148**

4. When you call, leave a message requesting an appointment.

- Choose which of our three Capstone offices you wish to use —**Barre, Morrisville, and Randolph**. No other sites are open this year.
- Clearly state your **name and a good phone number** to call you back. Please be patient and don't leave multiple messages. It may take a couple days for us to call you back to schedule your appointment.

5. PLEASE ARRIVE PROMPTLY AND ONLY AT YOUR APPOINTED TIME.

- We cannot see you sooner if you are too early; we cannot invite you inside to wait.
- If you are late, we may need to reschedule.
- **Be sure to bring the two completed forms and all required tax documents with you.** Missing forms or documents will result in having to reschedule your appointment.

→ At this SHORT in-person appointment, the VITA volunteer will review your documents:

- Check your ID and social security cards and give them back to you.
- Check the IRS form and the Capstone intake forms for completeness.
- Check to ensure all needed tax documents are included (you may bring the list on the back for reference).

6. The VITA volunteer will retain your documents, do your tax returns remotely, then contact you to schedule an appointment to sign and pick-up your returns. The returns will be e-filed after you sign.

- **DO NOT COME TO THE OFFICE IF YOU HAVE ANY COVID-19 SYMPTOMS OR MAY HAVE BEEN EXPOSED TO COVID-19**
- **Please do NOT bring children or pets**
- **The following Covid-19 protocols will be in place for all in-person meetings:**
  Mask required • Plexiglass dividers • Six-foot distance maintained • Hand sanitizer

If desired, you may do your own taxes at www.myfreetaxes.com, an IRS/VITA supported site with prompts.

Due to the Covid-19 procedures in place this year for the VITA Tax Program, it is essential that you have all needed documentation with you when you come for your interview appointment.

CAPSTONE COMMUNITY ACTION

QUESTIONS: 477-5148

Please read the list below carefully and <u>check off</u> each item as you gather it.

<u>Everyone needs to bring to interview:</u>

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

☐ **Social Security <u>Card</u>** for yourself, spouse and dependents if applicable *(or ITIN if applicable)*

<u>Depending on your particular circumstances</u> and reason for filing, the items below may or may not apply to you and/or your spouse (if married filing jointly). Form name is **bold** in parenthesis.

☐ Wage statement from <u>all</u> employers (**W-2**); <u>not pay stubs</u>

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

☐ Retirement Income from IRA and Pension statements (**1099-R**)

☐ Social Security <u>annual statement</u> received in the mail (**1099-SSA**)

☐ Social Security Disability or Supplemental Insurance (if applicable) - form letter stating monthly benefit for 2020 or a bank statement showing SSDI/SSI deposits

☐ Any other income statements you received, such as -

- <u>unemployment compensation</u> (**1099-G**) *both Federal & State are reported*
- cancellation of debt (**1099-C**)
- gambling winnings (**W2-G**)
- miscellaneous non-employee income (**1099 MISC**), and independent contractor (**1009-NEC**)
- cash payment receipts for work performed, even if you did not receive a statement

☐ Self-employment income (if applicable) – <u>tallied</u> record of gross receipts & list of expenses

☐ IRS Notice 1444 / Economic Impact Statement regarding “stimulus checks”

☐ Any other tax-related statements received, such as Mortgage Interest Statement (**1098**), Tuition Statement (**1098-T**), and Student Loan Interest paid (**1098-E**)

☐ **Acknowledgements** for <u>cash</u> charitable contribution from churches, school, charities, etc.

☐ Vermont Health Connect statement (**1095-A**) only if you had health insurance from VHC; other health insurance statements (1095-B/C) are not required

☐ Bank routing and account numbers (written) or voided check, if electing direct deposit

☐ Statement from registered daycare provider, if applicable

☐ **Homestead Declaration** - <u>Current</u> **Property Tax Bill** (2020-2021) if you own a home; <u>call your Town Clerk if you don’t have a copy</u>

☐ **Renter’s Rebate** - <u>Original</u> Landlord Certificate (**LC-42**)

☐ **For Renter’s Rebate and Homestead Declaration** – include written information for both taxable & non-taxable income and Social Security # for <u>everyone who lived with you</u> last year

☐ A copy of your federal 2019 return if you can, especially if you did not have your taxes done with Capstone