

VITA DROP-OFF CHECKLIST

TAXPAYER NAME(S):	FOR OFFICE USE ONLY Check off documents received and N/A for documents that are Not Applicable to the taxpayer(s).
ADDRESS:	
PHONE NUMBER (REQUIRED)	
*EMAIL ADDRESS (REQUIRED if you have one) *	
<input type="checkbox"/> Photo Copy of valid Photo ID (REQUIRED).	
<input type="checkbox"/> Photo Copy of Social Security Cards or ITIN (Individual Taxpayer Identification number) for you and anyone else on your tax return (REQUIRED).	
<input type="checkbox"/> Documentation for ALL income, Social Security or pensions, including forms W-2, 1099-R, SSA 1099, etc.	
<input type="checkbox"/> Education expenses & student loan payments, 1098-T, 1099-E.	
<input type="checkbox"/> Payment documentation for child care expenses. *Must have day care provider's name, address, amount paid and tax ID number/SSN.	
<input type="checkbox"/> Mortgage 1098 form & receipts of property & car taxes paid.	
<input type="checkbox"/> Access Health CT form, 1095A, only if you purchased insurance through Access Health (Marketplace Exchange).	
<input type="checkbox"/> Identity theft PIN # (if applicable).	
<input type="checkbox"/> Bank name, routing and account numbers to direct deposit your refund.	
<input type="checkbox"/> Copy of last year's (2020) Federal & State returns (REQUIRED).	
<input type="checkbox"/> Any tax documents you feel may be important for us to review.	
<input type="checkbox"/> Amount of Stimulus Payment(s) received (if any) in 2021.	
<input type="checkbox"/> IRS Letter 6419 (if you received any Advance Child Tax Credit payments that were disbursed to you in 2021)	
PLEASE RETURN THE ABOVE DOCUMENTS ALONG WITH THE FOLLOWING FORMS FILLED OUT (Must be returned SEALED in the packet provided). Return to the metal lockbox outside the Keefe Community Center.	
<input type="checkbox"/> FORM 13614-C Intake/Interview & Quality Review Sheet (Included in the packet).	
<input type="checkbox"/> FORM 14446 Virtual VITA Taxpayer Consent (Included in the packet). This gives us your permission to prepare your taxes remotely. You will receive a hard copy of your 2021 tax return in the mail once completed and discussed with the taxpayer.	