



VITA TAX INFORMATION SHEET

February 8 through April 9, 2021

Due to COVID-19, VITA volunteers will assist lower-income taxpayers without meeting them in person.

- Visit Newton Public Library starting Monday, Feb. 8, and pick up a VITA packet at the public service desk. The packet will include detailed instructions, plus forms to fill out.
- Return the completed VITA packet, along with your tax documents, to the public service desk. Include copies of photo IDs for yourself and your spouse, along with Social Security or ITN cards for all family members, including children. A self-service copy machine is available at the library, \$0.10 per page. Documents are securely stored.
- Once your packet has been submitted, you will receive a phone call from a volunteer within seven days. The volunteer will either request more information or let you know that your tax return can be picked up at the library.
- After you have picked up your return, a volunteer will call again to review it with you. Then you will return the included authorization form to the public service desk, and your return will be filed electronically by the VITA volunteer.

The deadline to submit a VITA packet is Friday, April 9.

**VITA volunteers *DONATE* their time to assist you.
Their service is greatly appreciated.**

DOCUMENTS YOU WILL NEED TO COPY & PROVIDE:

- Copy of last year's tax return.**
- Photo identification cards:** for both the taxpayer and spouse (if joint return) **REQUIRED!**
- Social Security or ITN cards:** for each taxpayer and dependent on the return **REQUIRED!**
- Medical insurance information:** Company, amount paid, type of coverage, coverage dates
- Wage and earning statements:** W-2s, W-2G, 1099-Misc. for all 2020 employers
- Important Tax Documents:** such as gambling wins, pensions, IRA distributions, tuition payments, Social Security forms, etc.
- Interest and dividend statements:** from banks or other financial institutions
- Bank routing numbers and account numbers:** for automatic deposit
- Day-care expenses and day-care provider information:** name, address, tax ID number
- Real estate tax and personal property:** tax statements (including vehicles)
- If you itemize:** receipts, bills or statements for your medical expenses, taxes, home mortgage interest, contributions, and miscellaneous expenses
- For Homestead:** (owner's only) real estate tax receipts
- For those with self-employment income, detailed list of income and expenses**

VITA volunteers cannot help taxpayers who have rental property, farm income, royalties, sale of business property, moving expenses, employee business expenses, military pay, or have a loss on Schedule C (self-employment).