



VITA TAX INFORMATION SHEET

February 7 through April 11, 2022

1. Pick up a VITA packet at the library, starting Feb. 1. Place documents in the envelope. (Remove documents from their mailing envelopes, and staple multi-page documents.) Fill out the interview sheet as completely as you can.

2. Return your packet to the library. **Packets will be accepted *only* during VITA volunteer hours, listed below.** (This is a change from last year.)

On Feb. 7 and April 11, volunteers will be available from 9:30 to 5. These will be the only Mondays with VITA volunteers present. Regular volunteer hours: Wednesdays 9:30-5; Thursdays 4-8; Saturdays 9:30-12:30.

3. You will be contacted by phone when your return is completed and asked to come to the library again for a review, which should take 5-10 minutes. Please be prepared to answer the phone when we call, or to return our call if we leave a message. The review must be completed before we can submit your return to the IRS.

We will try to prepare all returns within two weeks after receiving a packet. If you do not hear from us within two weeks, please come to the library during the above times.

The deadline to submit a packet is Monday, April 11.

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

DOCUMENTS YOU WILL NEED TO COPY & PROVIDE:

Last year's return / last year's VITA packet

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

Letter 6419: Total Advance Child Tax Credit Payments

Wage and earning statements: W-2s, W-2G, 1099-Misc. for all 2021 employers

Important Tax Documents: such as pensions, IRA distributions, tuition, Social Security forms, etc.

Interest and dividend statements: from banks or other financial institutions

Voided check: bank routing numbers and account number for direct deposit of refund or payment

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

Homestead (homeowners only): real-estate tax receipts

For those with self-employment income, detailed list of income and expenses

Taxpayers with income over \$54,000 may not be eligible for VITA. Volunteers cannot help those who have rental or farm income, royalties, sale of business property, moving expenses, employee business expenses, military pay, or a loss on Schedule C.