



Your tax appointment is:

DATE: \_\_\_\_\_

TIME: \_\_\_\_\_

Site: **University Mall**, So. Burlington, VT  
(across from JC Penney)  
for directions call 863-6248

Dear VITA Tax Client,

Thank you for calling Vermont 2-1-1. Your appointment was made especially for you. If you are unable to make your appointment, please reschedule by calling **211** at least 24 hours before the appointment.

1-items to bring to your appointment

- picture id (such as a current driver's license)
- COPY OF LAST YEARS TAX RETURN** (federal and state) if available
- Social security cards or ITIN (Individual Taxpayer Identification Number) letters for all members of your household, including children - we can't file your taxes without these**
- birthdates for all members of your household, including children
- income documents for ALL income received in 2022 eg W-2(job), W-2G(gambling), 1099-R(pension), 1099-INT(interest), 1099-DIV(dividends), 1099-SSA(social security), 1099-B(sale of asset), 1099-MISC(misc income), 1099-NEC (self employment), 1099-G(gambling), 1099-C(cancelled debt), Reach Up
- health insurance documents: 1095-A, 1095-B, 1095-C
- all child care expenses and daycare provider's social security number or EIN (employer id number)
- any education expenses (tuition, books, room and board) and any 1098-T(tuition)
- property tax bill from your town (for 2021-22 AND 2022-23) if you are filing for a property tax rebate
- all household income if filing for Property Tax credit
- completed and signed Landlord Certificate if rent a mobile home lot
- bank routing and account numbers (if you want direct deposit of your refund)

2-other reminders and notes

- please come 10-15 minutes early – there are 2 intake forms you must complete before your appointment can start
- if you are married-filing-joint and wish to electronically file, BOTH SPOUSES must be present to sign the return
- If you make less than \$70,000 you can do taxes for free at MyFreeTaxes.com; if you make over \$70,000 you can still use the MyFreeTaxes.com website, for a modest fee.