



Your tax appointment is:

DATE: _____

TIME: _____

SITE: CVOEO, 255 South Champlain St
Burlington, VT
(for directions call 863-6248 or
visit website CVOEO.org)

Dear VITA Tax Client,

Thank you for calling VITA. Your appointment was made especially for you. If you are unable to make your appointment, please reschedule by calling CVOEO at 863-6248 at least 24 hours before the appointment.

ABOUT YOUR TAX APPOINTMENT:

1-items to bring to your appointment

- picture id (such as a current driver's license)
- Vermont returns require Driver's license info (if you have one)
- copy of last year's 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 2018 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(self-employed), 1099-G(gambling), 1099-C(cancelled debt), Reach Up
- health insurance documents: 1095-A, 1095-B, 1095-C, any Exemption Certificate received
- 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 2017-18 AND 2018-19) if you are filing for a property tax rebate (Homeowners Property Tax Adjustment)
- completed and signed Landlord Certificate if you are filing for Renter's Rebate
- 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 \$54,000 or less, you are income eligible for the VITA program (or MyFreeTaxes.com).
- If you make less than \$64,000 you can do taxes for free at MyFreeTaxes.com; if you make over \$64,000 you can still use the MyFreeTaxes.com website, for a modest fee.