



Your tax appointment is:

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

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

SITE: **University Mall**, So. Burlington, VT  
(next to Shoe Dept Encore)  
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)
- Mask required to enter tax preparation office**
- COPY OF LAST YEARS TAX RETURN** (federal and state) if available – **NEEDED FOR POSSIBLE LARGER REFUND**
- 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 2021 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, 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)
- IRS Letter 6419 detailing how much Advanced Child Tax Credit you received**
- property tax bill from your town (for 2020-21 AND 2021-22) 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 \$58,000 or less, you are income eligible for the VITA program (or MyFreeTaxes.com).
- If you make less than \$66,000 you can do taxes for free at MyFreeTaxes.com; if you make over \$66,000 you can still use the MyFreeTaxes.com website, for a modest fee.