

# VITA Loveland Inc. Client Intake Checklist TY 2021

Read the IRS “**FREE TAX PREPARATION**” **INFORMATION SHEET** to be sure that you meet our client criteria and have all necessary paperwork. PLEASE DON'T STAPLE ANYTHING!

## PAPERWORK

- ☐ Read and sign **WELCOME INFORMATION ACKNOWLEDGEMENT**
- ☐ Complete the **Intake/Interview Quality Review Sheet (form 13614-C)**, first 3 pages.
- ☐ Your **government issued picture ID's** such as a CO driver's license or CO ID card for all **taxpayers** on the return are required.
- ☐ Provide either the **SS cards** or **SSA 1099 statements** (the pink striped SS statements mailed in late January to SS recipients) **for all taxpayers and dependents**. *If VITA Loveland Inc has prepared your tax return **and** it was accepted in the prior year with all current parties on the return; we have verified the names and SSN match and may waive this requirement.* If you received Social Security or SS Disability in 2021, we need the SSA 1099 statements for 2021.
- ☐ Provide a **voided check** with routing and account numbers if you wish direct deposit
- ☐ If one or both taxpayers are not present, a **Notarized Colorado Durable Power of Attorney** authorizing a spouse or family member to represent each taxpayer who is not present is required.
- ☐ Provide **all relevant tax documentation** as listed on the “FREE TAX PREPARATION” INFORMATION SHEET plus anything else you think we may need. If submitting brokerage statements, which are commonly revised up to mid-March, bring every page.
- ☐ Provide **IRS letter 6475 or all IRS Notices 1444C (3<sup>rd</sup> Economic Impact Payment for 2021)** to reconcile EIP 3 stimulus payments for 2021 (usually multiples of \$1400). If you did not receive or threw away **IRS letter 6475 or any IRS Notice 1444C**, add up what you received by checking your bank deposits. Claiming EIP inaccurately delayed refunds on average 4 months for TY 2020 filings. \*EIP 1 and EIP 2 both were reconciled on your **2020** tax return not the current tax year 2021.
- ☐ If you received Advance Child Tax Credit in the last 6 months of 2021, provide **IRS Letter 6419** sent in January of 2022 to reconcile any Advanced CTC you received. Not having the letter could make waiving overpayment repayments on your return difficult. We anticipate claiming Advanced CTC inaccurately will delay processing and refunds by 4 months or longer.
- ☐ Provide your **prior year tax returns** if possible, especially if we have not prepared them. If you receive EITC (Earned Income Tax Credit) your **2019** 1040 tax return has your earned income for that year. It may qualify you for, or increase, your EITC benefit for tax year 2021.