

Print taxpayer name: X\_\_\_\_\_

EMAIL \_\_\_\_\_

Cell Phone \_\_\_\_\_

Print spouse name: X\_\_\_\_\_

EMAIL \_\_\_\_\_

Cell Phone \_\_\_\_\_

## **WELCOME INFORMATION ACKNOWLEDGEMENT**

### **VITA Loveland Inc.**

VITA Loveland, Inc. is staffed by volunteers of varying backgrounds many of whom have years of tax preparation experience. Each year those who assist you in preparing your taxes must pass certifying IRS tests in current tax law. Certain areas of tax law are out of scope. We may not be able to help you if your return contains them. Representation of taxpayers before the IRS is only allowed by attorneys, CPA's, and Enrolled Agents—not VITA volunteers.

VITA Loveland, Inc. may securely retain your information to improve services to you. Electronic records will be maintained as required by the IRS. Information may also be used and disclosed to apply for funding and for publicity. Information disclosed will not include specific information about the taxpayer, is aggregated, and is anonymous. Your personal information is kept confidential and is not sold to any other organization or company. VITA Loveland Inc. may use it to contact you regarding tax related matters.

Taxpayer signature X\_\_\_\_\_ Date \_\_\_\_\_

Spouse signature X\_\_\_\_\_ Date \_\_\_\_\_

### **IF YOUR RETURN REQUIRES VIRTUAL PREPARATION!**

In certain circumstances your return may be prepared virtually. This means your scanned documents are uploaded to the secure computer servers of our vendor that also contain your tax returns. This is so our preparers and quality reviewers can access them remotely without physically exchanging them. A more detailed description is in IRS form 14446 Virtual VITA/TCE Taxpayer Consent which you must consent to and sign before we can help you if your taxes are done virtually.

If something needs clarification, a volunteer may contact you by phone or email. For security reasons do not email anything with PII (personally identifiable information). If calling you, volunteers may block their caller ID to preserve their privacy. To confirm a volunteer is who they say they are on the phone, you can ask them for a number from a random box on one of the documents that you have provided for us to upload.

\*2021 TY / 2022 Season