

## Senior Resource Center VITA information:

Due to COVID-19 restrictions, for the remainder of the tax season we have made some adjustments to our previous plan and must adhere to the following guidelines:

**We are serving the public with a drop off service by appointment only, as we are not permitted to take walk-ins at this time. To schedule an appointment for drop off, please leave your name and number on our VITA appointment line at 910-798-6416. A staff member from the Senior Resource Center will return your call within 24 hours to schedule an appointment to drop off your tax information. Please note, drop off appointments will be scheduled on Monday thru Friday between the hours of 12:00 – 2:00 pm.**

**We are only doing 2019 tax returns.**

In order to have your 2019 taxes prepared at the Senior Resource Center you **MUST** have the following information completed and assembled prior to the time of your drop off appointment:

1. A completed Intake Sheet **Available here** → [Intake Sheet](#)  
or you may pick one up at the Senior Resource Center between 10 am and 2 pm, Monday thru Friday. All questions on the Intake Sheet must be answered other than the shaded sections of the form. Be sure to include birth dates in Part II for any person listed under item 2. The last page should not be completed.
2. A photo ID for yourself. If you will be filing a joint return with your spouse, we must also see a photo ID for your spouse. Photo IDs for dependents are not required. Copies of photo IDs are acceptable. Note that we will **NOT** accept your information for return preparation without seeing a photo ID for you and, if applicable, your spouse.
3. Proof of Social Security Numbers. This proof must be provided for yourself, your spouse (if filing a joint return), and for any person you intend to claim as a dependent on your return. For anyone receiving Social Security benefits, the Form SSA-1099 received from the Social Security Administration is acceptable proof of that person's Social Security Number. For all others, we would prefer for you to provide a copy of the required Social Security card(s). If you cannot make a copy of the Social Security cards, you will need to bring in the original cards for our review. Note that we will **NOT** accept your information for return preparation without proof of the Social Security Number of everyone on the return.
4. A copy of the Virtual VITA/TCE Taxpayer Consent: **Available here** → [Virtual consent form](#)  
or you may pick one up at the Senior Resource Center between 10 am and 2 pm, Monday thru Friday. It must be signed by you and if you are married filing a joint return, your spouse. Please keep in mind: **Both spouses must** sign this Form before we can accept your information.

Click on the link provided here to view the detailed process of your income tax preparation through this virtual service: → [Virtual VITA process](#)

5. A copy of all tax documents that you have received. The following are examples of some of the tax documents you may have received (but most taxpayers will only have received a few of these documents):
  - a. Form W-2 for wages from an employer;
  - b. Form 1099-R for retirement or annuity benefits;
  - c. Form SSA-1099 for Social Security;
  - d. Form RRB-1099 for Railroad Retirement benefits;
  - e. Form 1099-INT for interest income;
  - f. Form 1099-DIV for dividend income;
  - g. Form 1099-MISC for miscellaneous income including income as a nonemployee worker;
  - h. Form 1099-G for government payments including unemployment compensation and state tax refunds;
  - i. Forms 1099-A or 1099-C for cancellation of indebtedness income (note that we are not permitted to do your return if you are in bankruptcy);
  - j. Form 1099-SA or Form 5498-SA for Health Savings Accounts;
  - k. Form W-2G for gambling winnings;
  - l. Form 1099-B broker statement showing sales of assets such as stocks and bonds;
  - m. Form 1099-S for the sale of real estate;
  - n. Form 1098-E for Student Loan Interest; and
  - o. Form 1095-A if you had insurance purchased through the Marketplace.
  
6. The following additional tax-related items:
  - a. All pages of any brokerage statements received.
  - b. The amount of alimony paid or received during 2019, the date of the divorce or separation agreement, and, if you are making alimony payments, the Social Security number of the person receiving the alimony.
  - c. If you had gambling winnings reported on a Form W-2G, the amount of your gambling losses for the year.
  - d. Your itemized deduction information including out-of-pocket medical expenses, real estate and personal property taxes paid, mortgage interest paid and charitable contributions made (you only need to include these if the total of your itemized deductions is more than \$12,200 on a Single or Married Filing Separately return, \$18,350 on a Head of Household return, or \$24,400 on a Married Filing Joint return – note that all of these numbers will be even higher for taxpayers over age 65).
  - e. If you were self-employed or received a Form 1099-MISC with an entry in Box 7, any income not reported on a Form 1099-MISC (such as cash income) and any expenses incurred with respect to this activity.
  - f. If you paid childcare expenses, the amount paid for childcare and the name, address, and Taxpayer Identification Number of the provider. If you, your spouse, or a dependent have educational expenses, the Form 1098-T received from the school and the student's student account statement.
  - g. If you are filing Married Filing Separately, the Social Security number of your spouse.
  - h. A voided check if you know you want to do direct deposit or direct debit.
  
7. A copy of your 2018 tax return (or the most recently filed return if you did not file for 2018).

Click here for a helpful checklist for you to complete prior to coming in to ensure you have brought everything you need. Please bring this checklist with you.

→ [What to bring checklist](#)

**Reminder: You must call the Senior Resource Center's VITA appointment line at 910-798-6416 to schedule a time to drop off your return. Walk-ins will not be accepted.**

***For your safety, and the safety of our staff and volunteers, you are encouraged to wear a mask at the time of your drop off appointment.***