

# SITE QUESTIONNAIRE

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## CONTACT INFO (please print legibly)

Name \_\_\_\_\_

Phone # \_\_\_\_\_

Email Address \_\_\_\_\_

The Key Word or Phrase is a security measure to help protect your identity. This can be any word or phrase YOU choose. Note: When you receive a call from VITA personnel about your tax information, they will ALWAYS provide your personal word or phrase to you so you know the call is legitimate. **Do not provide any personal information until you hear your personal key word or phrase.**

Your Personal Key Word or Phrase: \_\_\_\_\_

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## WHICH TAX YEAR RETURN(S) ARE NEEDED – check all that apply

- 2021 (current year)
- 2020
- 2019
- 2018

## SITE QUESTIONS

1. Was taxpayer's 2020 tax return prepared at *this* VITA site?
  - Yes
  - No
2. Was taxpayer's 2020 tax return prepared at *another* VITA/TCE site?
  - Yes
  - No
3. Has taxpayer ever referred someone to this VITA site?
  - Yes
  - No

## LANGUAGE INTERPRETER NEEDS

- I WILL require a Spanish/English language interpreter when discussing taxes
- I WILL NOT require a Spanish/English language interpreter when discussing taxes

## 2021 EARNED INCOME (WAGE INCOME PLUS SELF-EMPLOYMENT INCOME)

- My 2021 earned income was about the same or more than my 2019 earned income
- My 2021 earned income was much less than my 2019 earned income
- Unsure

**DID YOU HAVE DEPENDENT BORN OR ADOPTED IN 2021?**

- Yes
- No

**CASH CONTRIBUTIONS TO CHARITY** are deductible again for 2021 even if you do not itemize. The limit is \$300 for Single/Married Filing Separately and \$600 for Married Filing Jointly. Please specify the amount of **cash** contributions you made to charity during 2021 \$\_\_\_\_\_.

**DID YOU RECEIVE A STIMULUS PAYMENT IN 2021?**

- Yes, Amount: \_\_\_\_\_
- No
- Unsure

**DID YOU RECEIVE LETTER 6475 FROM THE IRS IN EARLY 2022 WHICH INDICTS YOUR TOTAL 2021 STIMULUS PAYMENTS?**

- Yes (please bring this to the Drop Off appointment)
- No
- Unsure

**DID THE TAXPAYER (OR SPOUSE IF MARRIED FILING JOINGLY) HAVE A PRINCIPAL PLACE OF ABODE IN THE US FOR MORE HALF OF 2021?**

- Yes
- No

**THAN DID YOU RECEIVE MONTHLY ADVANCE CHILD TAX CREDIT (CTC) PAYMENTS DURING THE SECOND HALF OF 2021?**

- Yes: Amount per month: \_\_\_\_\_ Total amount: \_\_\_\_\_ Number of Qualifying Children in 2020 \_\_\_\_\_
- No
- Unsure

**DID YOU RECEIVE LETTER(S) 6419 FROM THE IRS IN EARLY 2022 ABOUT YOUR ADVANCE CTC PAYMENTS? SPOUSES FILING JOINTLY WILL EACH RECEIVE A 6419 LETTER.**

- Yes (please bring the 6419 Letter(s) to the Drop Off appointment)
- No
- Unsure

**DID YOU RECEIVE A CORONAVIRUS-RELATED DISTRIBUTION DURING 2020 AND ELECT TO SPREAD THE INCOME OVER THREE YEARS BEGINNING WITH YOUR 2020 TAX RETURN?**

- Yes
- No
- Unsure

**WERE YOU A RESIDENT OF NC ALL OF 2021 (FROM 1/1/2021 THROUGH 12/31/2021)?**

- Yes
- No: Please specify the date you moved to NC \_\_\_\_\_ and the state you moved from \_\_\_\_\_

**IN WHICH COUNTY DO YOU CURRENTLY LIVE?**

- Wake
- Durham
- Franklin
- Johnston
- Other \_\_\_\_\_