

UNITED WAY OF PINAL COUNTY - VIRTUAL VITA - ADDITIONAL INFORMATION FORM

Date: _____ Enter Your Name [and] Your Spouse's Name (if married): _____

Your Phone Number: _____ Secondary Phone Number: _____

Your Email Address (please enter very clearly) _____

Which tax years are you seeking help with? **2020**, 2019, 2018, 2017, 2016 Other: _____

Do you allow us to prepare your taxes using our VIRTUAL VITA PROCESS? **Yes** No (we cannot help you)

How would you like to receive a copy of your tax return? **Email** **Snail Mail** **Pick up**

If our tax site is chosen for an accuracy review, would you allow an IRS employee to review your return? OPTIONAL **Yes** **No**

Can we include you in a headcount for reporting to our funders? **Yes** **No**

Can we transmit your personal tax information through our software (TAXSLAYER) to the IRS and to your bank (if direct deposit or debit)? YES IS REQUIRED FOR E-FILE AND DIRECT DEPOSIT/DEBIT **Yes** **No** (we won't be able to e-file)

Would you like some of your tax information to be carried forward to next year's VITA program at any site? OPTIONAL **Yes** **No**

List the date and amount of each economic stimulus payment received. (Example: April 15th, 2020 \$1200, January 4th, 2021, \$600) If you did not receive any, please let us know here.

If you are due a refund, would you like direct deposit? **Yes** **No**

Where do you bank and what is your account and routing number? (**CHECKING OR SAVINGS**) **BANK NAME:**
ROUTING NUMBER: _____ **ACCOUNT NUMBER:** _____

If you have a balance due, would you like to make a payment directly from your bank account? **Yes** **No**

6. Did you, or your spouse if filing jointly, receive a letter from the IRS? **Yes** **No**

If you did receive a letter from the IRS, what was it about?

Checklist of required documents

Intake Interview Form	
Your Photo ID (if married, we need your spouse's photo ID as well)	
Social Security cards for everyone	
Tax forms (W2, 1099, 1098, 1095)	
Letters from IRS if available	
Additional information such as letters from eligible Arizona organizations for charitable contribution credits.	