

PREPARE FOR YOUR APPOINTMENT - CHECK LIST



- ✓ PLEASE REGISTER for an appointment by calling 2-1-1 WNY
- ✓ Your annual income must be **\$58,000 or less.**
- ✓ Appointments are REQUIRED. Call 211 (No exceptions).
- ✓ Please arrive ON TIME for your scheduled appointment.

WHAT TO EXPECT WHEN YOU ARRIVE:

1. You will be asked to complete the IRS Intake Form – Please answer all questions
2. Sign and Date your IRS intake Form on page 4.

**** it is required to work on your return****

REQUIRED ITEMS FOR YOUR APPOINTMENT.

You will need:

- **Tax Information such as Forms W-2, 1099, 1098, 1095.**
- **Social security cards or ITIN letters for all persons on your tax return.**
- **Picture ID (such as valid driver's license) for you and your spouse.**
- **A WORKING TELEPHONE NUMBER or NUMBERS. We may need to call you for additional information.**
- **Copies of your W-2s for each job held in 2022 for each person in the household, this form reports your name, wages, and other tax information to the IRS.**
- **1099's showing either:**
 - **Unemployment Income**
 - **Social Security Income**
 - **State tax refund**
- **For direct deposits – a valid bank account and bank routing number must be provided.**

PLEASE COMPLETE PAGES 1-4 of FORM 13614-C(October 2022)

<https://www.irs.gov/pub/irs-pdf/f13614c.pdf>

WE WANT YOU SAFE

*** Our VITA COVID-19 Protocols include: ****

You must always wear a mask while in the building.

Only the person(s) who sign the return are allowed in.