

# INTAKE ADDENDUM

Did you have your tax return prepared here or at another VITA site or at an AARP Tax Site last year? Yes or No

If yes, at which site? \_\_\_\_\_

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If you answered YES on the yellow Intake/Interview & Quality Review Sheet to any of the questions numbers listed on this addendum, please answer the additional questions below.

## **Part III Income**

### **Question 2:**

- If you had Tips that you did NOT report to your employer, how much was the total unreported tips? \_\_\_\_\_
- Did you receive less than \$20 in tips per month? Yes or No

### **Question 7:**

If you had self-employment income, please answer these questions:

- Is this business on a cash basis? Yes or No  
If NO, the return is out of scope. You will need to go to a professional tax preparer.
- Did you materially participate in the operation of this business? Yes or No
- Car and Truck Expenses:  
What time of vehicle is used in your business? \_\_\_\_\_  
What date did you place your vehicle in service for business purposes?  
\_\_\_\_\_ Business miles \_\_\_\_\_ commuting miles  
\_\_\_\_\_ Other miles
- Do you or your spouse have another vehicle available for personal use?  
Yes or No
- Was your vehicle available for personal use during off-duty hours?  
Yes or No

- Do you have evidence to support your deduction? Yes or No  
Is the evidence written: Yes or No

**Question 5:**

We will need the amount paid to each daycare along with the name, address, and Taxpayer ID number for the daycare. Your daycare provider should give you this information.

**Part V-Life Expenses**

**Question 1:**

How many months in 2020 did you have a Health Savings Account? \_\_\_\_\_

What is the total of all amounts contributed to your Health Savings Account (excluding any amounts contributed by your employer)? \_\_\_\_\_

**Question 10:**

Did you receive one or more stimulus checks (Economic Impact Payments) During 2020 or 2021? Yes or NO

If yes:

- How much was your first stimulus payment received in 2020?  
(generally \$1200 per taxpayer and \$500 per child under 17)  
\_\_\_\_\_
- How much was your second stimulus payment received in late December 2020  
or January 2021 (generally \$600 per taxpayer and child under 17)?  
\_\_\_\_\_
- If you have the letters from the White House or other documents that show the  
amount you received, please include a copy of these documents.

If No: do you think that you were supposed to receive them? Yes or No

**North Carolina Tax Return Items:**

In which county do you live? \_\_\_\_\_

Were you a resident of NC all year during 2020? Yes or No

- If no, what date did you move to NC? \_\_\_\_\_
- What was your former state of residence? \_\_\_\_\_

Did you have income from work you did in another state while living in NC?

Yes or No

Did you contribute \$300 or more to a charitable organization? Yes or No

**Question 11:**

If there is no taxable amount shown in Box 2A of your Form 1099-R, please answer the following:

- What was your retirement date? \_\_\_\_\_(MM/DD/YYYY)
  - Is this a joint or survivor annuity? Yes or No  
If Yes, be sure to bring a copy of last year's tax return
  - Number of months you received annuity payments in 2020? \_\_\_\_\_
  - Are you a retired public safety officer (police/law enforcement/EMT/Firefighter, Chaplain or member of a rescue squad or ambulance crew)? Yes or No
  - Was any of the amount shown in box 1 Gross Distribution paid directly from your plan to an insurance provider for accident or health insurance or long-term insurance? Yes or No
  - NC Residents: Are you covered by the Bailey Settlement? Yes or No

Did you take an early distribution from your IRA, 401(k) or 403 (b) plan due to COVID-19? Yes or No

**Question13:**

If you received a lump-sum Social Security payment(s) during 2020, we will need to see your tax return(s) for the years covered by the lump-sum payment.

**Part IV Expenses:**

**Question 1:**

If you made alimony or separate maintenance payments, was the decree requiring the payments executed on or before December 31, 2018? Yes or No

**Question 2:**

If you had college or after high school education expenses, please include your account statement from your educational institution and any receipts for course related expenses.

**Question 3:**

If you had any of the expenses in this question, please include documentation of the amounts.