

INTAKE ADDENDUM

1. Did you receive one or more stimulus checks (Economic Impact Payments)
 YES Amount of first stimulus payment received during 2020 (generally \$1,200 per taxpayer and \$500 per child under 17)? \$ _____
Amount of 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 received from the White House or other documents that specified the amount you received, please bring these documents with you.
 NO If not, do you think you should have? YES NO
2. Cash contributions to charity are deductible for 2020 up to a maximum of \$300 even if you do not itemize. Please specify the amount of **CASH** contributions you made to charity during 2020 \$ _____
3. Which VITA site do you typically have prepare your taxes? _____

TECHNOLOGY CHECKLIST

The most efficient way for us to review your return with you remotely, and still allow you to see the return before we file it, is through VIDEO CONFERENCING. To do this, we use a platform called “ZOOM” which is internet based. Please answer the following questions to help us assess whether or not you are able to “ZOOM” with us.

TECHNOLOGY

- Windows or Mac computer/laptop (*preferred*)
- iPad or Windows tablet
- iPhone or Android smart phone
- N/A - I don't have access to a computer or smart device

INTERNET ACCESS

- I have a reliable internet connection
- I DO NOT have access to the internet

FAMILIARITY

- I have a ZOOM account/I have used ZOOM for virtual meetings/gatherings
- I have not used ZOOM, but am familiar with/have used other virtual meeting platforms
- I have never used ZOOM or any other virtual meeting platform
- N/A - I don't have access to a smart device

CONTACT INFO

Name (please print) _____ Phone _____

Email (please print legibly) _____

Key Phrase to help you verify our identity when we call (can be any word or phrase you choose)

Word or Phrase: _____