

# SITE QUESTIONNAIRE

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

- ☐ 2020 (current year)
- ☐ 2019
- ☐ 2018
- ☐ 2017

## SITE QUESTIONS

1. Was taxpayer's 2019 or 2018 tax return prepared at this VITA site?
  - ☐ Yes
  - ☐ No
2. Has taxpayer ever referred someone to this 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

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
- ☐ iPad or Windows tablet
- ☐ iPhone or Android smart phone
- ☐ I do not have access to a computer or smart device

## INTERNET ACCESS

- ☐ I DO 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 I 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** (please print legibly)

Name \_\_\_\_\_

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

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

Best Days/Times to call \_\_\_\_\_

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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**Did you receive one or more STIMULUS CHECKS (Economic Impact Payments) during 2020 or 2021?**

- ☐ YES – If so, what was the amount of your first stimulus payment received during 2020 (generally \$1,200 per taxpayer and \$500 per child under 17)? \$\_\_\_\_\_

What was the 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 received stimulus payments?
- ☐ Yes
  - ☐ No

Please confirm by checking the website below or call the IRS at the number below:

- ☐ <http://www.irs.gov/coronavirus/get-my-payment>
- ☐ IRS Stimulus Check Payment Trace 800-919-9835

**WAS A DEPENDENT CHILD BORN IN 2020?**

- ☐ Yes
- ☐ No

**2020 EARNED INCOME (WAGE INCOME PLUS SELF-EMPLOYMENT INCOME)**

- ☐ My 2020 earned income was about the same or more than my 2019 earned income
- ☐ My 2020 earned income was much less than my 2019 earned income

**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 \$ \_\_\_\_\_

**IN WHICH COUNTY DO YOU LIVE?**

- ☐ Wake
- ☐ Durham
- ☐ Other \_\_\_\_\_

**WERE YOU A RESIDENT OF NC ALL YEAR DURING 2020?**

- ☐ Yes
- ☐ No – Please specify the date you moved to NC \_\_\_\_\_

If you moved to NC in 2020, please provide the name of the state from which you moved  
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