

## INTAKE ADDENDUM

1. Did you receive one or more stimulus checks (Economic Impact Payments)  
 YES Amount of third stimulus payment received during 2021 (generally \$1,400 per taxpayer and per dependant)? \$ \_\_\_\_\_  
*Please bring your Letter 6475 (mailed to you from the IRS in January 2022)*  
Amount of any Advanced Child Tax Credit you received in 2021 (generally \$200-300 per child under 17)? \$ \_\_\_\_\_  
*I Please bring your Letter 6419 (mailed to you from the IRS in January 2022)*  
 NO If not, do you think you should have?  YES  NO
2. Cash contributions to charity are deductible for 2021 up to a maximum of \$300 even if you do not itemize. Please specify the amount of **CASH** contributions you made to charity during 2021 \$ \_\_\_\_\_
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: \_\_\_\_\_