INSTRUCTIONS

THE River Center
Supporting Our Community for Generations

Complete the following:

1. Drive-Thru Tax Intake Sheet
2. Page 3 of Form 14446
3. (Yellow) Form 13614-C - Intake/Interview & Quality Review Sheet (4 pages)
4. Place completed forms in the white Important Tax Records envelope (if you have picked one up) or a folder (if you have downloaded the packet)
5. Remove all tax documents from their mailing envelopes and place them in the white envelope/folder.

NEXT STEPS: (Masks and cell phone required)

1. Go to The River Center during your scheduled block of time - First-come/First-served by appointment only. **Expect a waiting time of a couple of hours**

   a. **SATURDAY APPOINTMENTS**
      - Follow the signs to drive up to the front entrance of 9 Vose Farm Road
      - **Do not park your car** - follow the line if there is one, or drive up to the front entrance if there is none
      - Wait for the VOLUNTEER GREETER to come to your car

   a. **WEDNESDAY APPOINTMENTS**
      - Park your car
      - Call (603) 924-6800 to let us know you have arrived and give a description of your car
      - Wait for the VOLUNTEER GREETER to come to your car

REQUIRED DOCUMENTS

- Photo ID for taxpayer (and spouse)
- Social Security Cards (copies) for every person on the tax return <---IMPORTANT!
  - Other acceptable forms:
    - letter from the Social Security Administration (SSA)
    - Form SSA-1099
    - and/or any other verification issued from the SSA
  - Banking information for direct deposit - Bank Name, Acccount and Routing #
- All applicable documents (see the Drive-Thru Intake Form)

Please reschedule if you are sick or have been exposed to someone who is.

Any questions? Call us at (603) 924-6800

The River Center
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DRIVE-THRU TAX INTAKE

When entering information, please double-check accuracy;

NAME OF PRIMARY TAXPAYER (same as on prior return or SS card)

_______________/__________/_______________
First Middle LAST

SPOUSE'S NAME (if filing jointly, as it appears on prior return or SS card)

_______________/__________/_______________
First Middle LAST

BANKING INFO (if not providing a voided check; if splitting refund write other account info on back of this page)

Bank Name: ______________________

Routing Number: ______________________

Account Number: ______________________

SUBSCRIBE TO OUR NEWSLETTER

Sign up to receive email updates on programs, news, special guest speakers, and more about once a month. YES NO

Email:______________________

CONTACT INFO - cell phone required; call for more info

Cell Phone:______________________

Color/Model of Car:______________________

Have you had your return prepared by us within the last 3 years? YES NO
Circle one

Do you have a filing requirement? YES NO UNSURE
Circle one

**** 3rd Stimulus Payments Received:** ______________

Do you have IRS Letter 6475? YES NO UNSURE

****Child Tax Credit Payments Total Received:**______________

Do you have IRS Letter 6419? YES NO UNSURE

If you do not have these letters and you received these payments, you can get them from IRS.gov if you create an ID.me account. Otherwise, check your bank statements. If these numbers are not accurate, the IRS will hold up your return, delaying any refund considerably.

By providing your email address, you are consenting to receive marketing emails from: The River Center, 9 Vose Farm Rd , Suite # 115, Peterborough, NH, 03458, US, http://www.rivercenter.us. You can revoke your consent to receive emails at any time by using the SafeUnsubscribe® link, found at the bottom of every email. Emails are serviced by Constant Contact.

Important

Due to the COVID pandemic, we have had to adjust our procedures for the protection of you, staff, and our volunteers.

The River Center office is closed to the public currently. Because we are not preparing your return face-to-face, you will need to fill out more forms so that we can gather as much information as we can to provide a complete and accurate return.

We are also relying on you when you pick up your return, to verify the accuracy of information on your return and to ask questions.

Please be flexible and understanding as we navigate through tax preparation in this ever-changing COVID reality!

If you have any questions about completing the forms or you are unsure if you qualify for the program, please contact us at ***(603) 924-6800*** *or* ***taxes@rivercenter.us***

DOCUMENT CHECKLIST

Note: We cannot accept documents by email; ALL necessary documents required

REQUIRED

- ☐ Photo ID for you (and your spouse)
- ☐ SSN Card(s) for everyone listed on the intake form: you, your spouse, dependents)
- ☐ Cover sheet - completed; answer only the sections that apply
- ☐ Form 14446 - Virtual VITA Taxpayer Consent
- ☐ Form 13614-C Intake/Interview Sheet (yellow form)
- ☐ Bank Info - Bank Name, Routing & Account numbers for direct deposit; ex. voided check

Bring the following or check your bank statements for total amounts (if applicable)

- ☐ IRS Letter 6475 (stimulus payment total)
- ☐ IRS Letter 6419 (Advance Child Tax Credit)

Recommended Items

- ☐ Last year's tax return - Form 1040 and schedules only, *if available*

Higher Education Expenses (if applicable)

- ☐ Form 1098-T, account statements,
- ☐ receipts for books and supplies; total the following categories: ○Tuition ○Fees (academic fees only) ○Books (course-required only) ○Supplies (course-required only)

HSA (if applicable)

- ☐ Form 1099-SA
- ☐ Form 5498-SA
- ☐ If you took distributions from your HSA, incl. total of *qualified* medical expenses only (list on separate sheet)

- ☐ **Marketplace Health Insurance Form (Form 1095-A)**

Income

- ☐ Wages (Form W-2)
- ☐ Interest from checking and savings accounts (Form 1099-INT)
- ☐ Dividend transactions (Form 1099-DIV)
- ☐ Unemployment compensation (Form 1099-G)
- ☐ Retirement account transactions (Form 1099-R, Form SSA-1099, Form RRB-1099)
- ☐ Gambling winnings (Form W2-G)
- ☐ Stock transactions with basis reported (Form 1099-B)
- ☐ Self-Employment Income
  - 1099-Misc,1099-NEC
  - Business expenses: supplies, advertisement, etc (see your prior year's business expenses for guidance)
  - Vehicle information (if deducting mileage): year vehicle was placed in service, total business miles, total commuting miles, and total person miles

Ask for a Self-Employment Tax Organizer Form

Adjustments/Deductions

- ☐ Student loan interest payments (1098-E)
- ☐ Educator Expenses for K-12 (receipts, totaled)
- ☐ Charitable contributions
- ☐ Child care expenses (provider's name, address and SSN or Employer Tax ID, total)

OTHER

- ☐ ______________
- ☐ ______________
- ☐ ______________
- ☐ ______________
- ☐ ______________
- ☐ ______________

Form **14446** (November 2021)	Department of the Treasury - Internal Revenue Service **Virtual VITA/TCE Taxpayer Consent**

This form is required whenever the taxpayer's tax return is completed and/or quality reviewed in a non-face-to-face environment. The site must explain to the taxpayer the process used to prepare the taxpayer's return. If applicable, volunteers must advise taxpayers of the associated risk of transferring their data from one site location to another site.

Part I - To be completed by the VITA/TCE site:

Site name

The River Center

Site address *(street, city, state, zip code)*

9 Vose Farm Road, Suite 115, Peterborough, NH 03458

Site identification number (SIDN)	Site coordinator name
S11310136	Vanisa Simila
Site contact name	**Site contact telephone number**
Vanisa Simila/Margaret Nelson	(603) 924-6800

This site is using the following Virtual VITA/TCE method(s) to prepare your tax return:

☒ **A. Drop Off Site:** This site uses a drop off process which includes the site maintaining personal identifiable information *(social security numbers, Form W-2, etc.)* to prepare the tax return at the same site but at a later time. In this process, you will come back to the same site for the quality review and/or signing the completed tax return. The site must explain the method it uses to contact you if additional information is needed.

☐ **B. Intake Site:** This method includes the taxpayer leaving their personal identifiable information *(social security numbers, Form W-2 and other documents)* at the site in order to prepare and/or quality review the tax return at another location. In this process, the taxpayer's tax return information may be sent to another location for one or more of the following reasons; interviewing the taxpayer, preparing the tax return, or performing a quality review. The taxpayer may come back to the intake site for the quality review or to review and sign the completed tax return.

☐ **C. Return Preparation and/or Quality Review Only Site:** This site may receive returns from one or more intake sites to prepare and/or quality review returns. This site generally does not take walk-in or appointments from other taxpayers in their location.

☐ **D. Combination Site:** This site prepares returns for other permanent or temporary intake sites and assist walk in and appointment only taxpayers within their location.

☐ **E. 100% Virtual VITA/TCE Process**: This method includes non face-to-face interactions with the taxpayer and any of the VITA/TCE volunteers during the intake, interview, return preparation, quality review, and signing the tax return. The site must explain the process and consent. This includes the virtual procedures to send required documents (social security numbers, Form W-2 and other documents) through a secured file sharing system to a designated volunteer for review.

Part II: The Sites Process:

Explain how each process will be followed to assist taxpayers remotely. How will the site manage:

1. Scheduling the appointment

Taxpayers call The River Center at (603) 924-6800 ext. 30 to make an appointment at the site. The appointments are made on Eventbrite.com event software. Taxpayers are told that the site is using a "Same Day Drive-Thru Drop-off" model. Taxpayers are told that they will receive a reminder email if they have provided an email address, or a reminder phone call if no email.

2. Securing Taxpayer Consent Agreement

Taxpayers sign the last page of IRS Form 14446 giving the VITA site permission to process the tax return by phone and on-site while the taxpayer waits in their car. Taxpayers also sign the IRS From 15080 VITA Global Carry Forward Consent which is page 4 of the IRS 13614-C Intake Form allowing their basic information to populate future VITA tax returns when they return to any VITA site.

3. Performing the Intake Process *(secure all documents)*

VITA Greeters/Intake Specialist Volunteer greet the Taxpayers carside. ID is verified, tax documents and signed consent forms and intake forms are collected and placed in a White IRS Important Papers Envelope (Pub 730). The completed envelope is handed to the Intake Specialist or the Tax Preparer to conduct the Intake/Interview by phone (or carside if need be).

4. Validating taxpayer's authentication *(Reviewing photo identification & Social Security Cards/ITINS)*

Taxpayers are instructed when they make an appointment to bring copies of all picture ID cards and all Social Security cards for all persons on the Taxpayer's tax return. VITA Greeters/Intake Specialist Volunteers verify the taxpayers' identities when they drop off their tax documents.

5. Performing the interview with the taxpayer(s)

Taxpayers arrive at their scheduled appointment with all of their tax documents ready to be dropped off at the site. VITA Intake Volunteers will ensure that the taxpayer has provided all necessary documents. The white Pub 730 envelope with tax documents is delivered to the Tax Preparer who calls the Taxpayer and conducts the Form 13614-c Interview by phone

6. Preparing the tax return

The white Pub 730 envelope with the taxpayer's documents are delivered to the VITA Tax Preparer. Wearing a KN95 mask, the Tax Preparer enters the information in Intake Form 13614-C and the provided documents to input the Taxpayer's information into TaxSlayer software while Taxpayer waits in their own car in the parking lot.

7. Performing the quality review

Another Advanced-certified Quality Reviewer/Tax Preparer quality reviews the tax return on TaxSlayer software. The Quality Reviewer will indicate whether or not the return is complete or if changes are to be made. A copy of the is return handed to Taxpayer for review by phone.

8. Sharing the completed return

The VITA Volunteer Greeter or Tax Preparer will locate the Taxpayer by car and check photo IDs before handing the copy of the return to the Taxpayer. The Tax Preparer calls the Taxpayer by cellphone to complete the review by phone or will review the return carside with the Taxpayer. If changes are to be made, Tax Preparer will make changes and print new copies of the return for signing.

9. Signing the return

If the return is accepted as completed by the Taxpayer, the VITA Volunteer will hand the white Pub 730 envelope to the Taxpayer and pull out 2 copies of Form 8879. The Taxpayer (and spouse if applicable) sign both forms, keeps one copy and hands the other copy back to the VITA Volunteer. This copy is placed in the assigned VITA File Bin for the VITA E-Filer to confirm e-file consent.

10. E-filing the tax return

The assigned VITA File Bin folder with the signed 8879s are retrieved by the VITA e-filer who then e-files the return using the TaxSlayer software. The required documents are stored at the River Center in a locked filing cabinet for one year and then shredded.

Page three of this form will be maintained at the site with all other required documents.

Part III: Taxpayer Consents:

Request to Review your Tax Return for Accuracy:

To ensure you are receiving quality services and an accurately prepared tax return at the volunteer site, IRS employees randomly select free tax preparation sites for review. If errors are identified, the site will make the necessary corrections. IRS does not keep any personal information from your reviewed tax return and this allows them to rate our VITA/TCE return preparation programs for accurately prepared tax returns. If you do not wish to have your return included as part of the review process, it will not affect the services provided to you at this site. If the site preparing this return is selected, do you consent to having your return reviewed for accuracy, by an IRS employee?

☐ Yes ☐ No

Virtual Consent Disclosure:

If you agree to have your tax return prepared and your tax documents handled in the above manner, your signature and/or agreement is required on this document. Signing this document means that you are agreeing to the procedures stated above for preparing a tax return for you. (If this is a Married Filing Joint return both spouses must sign and date this document.) If you chose not to sign this form, we may not be able to prepare your tax return using this process. Since we are preparing your tax return virtually, we have to secure your consent agreeing to this process. If you consent to use these non-IRS virtual systems to disclose or use your tax return information, Federal law may not protect your tax return information from further use or distribution in the event these systems are hacked or breached without our knowledge. If you agree to the disclosure of your tax return information, your consent is valid for the amount of time that you specify. If you do not specify the duration of your consent, your consent is valid for one year from the date of signature. If you believe your tax return information has been disclosed or used improperly in a manner unauthorized by law or without your permission, you may contact the Treasury Inspector General for Tax Administration (TIGTA) by telephone at 1-800-366-4484, or by e-mail at complaints@tigta.treas.gov. While the IRS is responsible for providing oversight requirements to Volunteer Income Tax Assistance (VITA) and Tax Counseling for the Elderly (TCE) programs, these sites are operated by IRS sponsored partners who manage IRS site operations requirements and volunteer ethical standards. In addition, the locations of these sites may not be in or on federal Property.

I am agreeing to use this site's Virtual VITA/TCE Process ☐ Yes ☐ No

Printed name		Printed name *(spouse if married filing joint)*	
Date of birth	Last four digits Social Security/ITIN number	Date of birth	Last four digits Social Security/ITIN number
Date	Telephone number	Date	Telephone number
Email address		Email address	
Signature *(electronic)* **OR**		Signature *(electronic)* **OR**	
Signature *(type/print)*		Signature *(type/print)*	

Form 13614-C (October 2021)	Department of the Treasury - Internal Revenue Service **Intake/Interview & Quality Review Sheet**	OMB Number 1545-1964

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.**

- **Please complete pages 1-4 of this form.**
- **You are responsible for the information on your return. Please provide complete and accurate information.**
- **If you have questions, please ask the IRS-certified volunteer preparer.**

Volunteers are trained to provide high quality service and uphold the highest ethical standards.
To report unethical behavior to the IRS, email us at wi.voltax@irs.gov

Part I – Your Personal Information *(If you are filing a joint return, enter your names in the same order as last year's return)*

1. Your first name	M.I.	Last name	Best contact number	Are you a U.S. citizen? ☐ Yes ☐ No
2. Your spouse's first name	M.I.	Last name	Best contact number	Is your spouse a U.S. citizen? ☐ Yes ☐ No

3. Mailing address	Apt #	City	State	ZIP code

4. Your Date of Birth	5. Your job title	6. Last year, were you: a. Full-time student ☐ Yes ☐ No b. Totally and permanently disabled ☐ Yes ☐ No c. Legally blind ☐ Yes ☐ No
7. Your spouse's Date of Birth	8. Your spouse's job title	9. Last year, was your spouse: a. Full-time student ☐ Yes ☐ No b. Totally and permanently disabled ☐ Yes ☐ No c. Legally blind ☐ Yes ☐ No

10. Can anyone claim you or your spouse as a dependent? ☐ Yes ☐ No ☐ Unsure

11. Have you, your spouse, or dependents been a victim of tax related identity theft or been issued an Identity Protection PIN? ☐ Yes ☐ No

12. Provide an email address *(optional) (this email address will not be used for contacts from the Internal Revenue Service)*

Part II – Marital Status and Household Information

1. As of December 31, 2021, what was your marital status?

☐ Never Married (This includes registered domestic partnerships, civil unions, or other formal relationships under state law)

☐ Married
a. If Yes, Did you get married in 2021? ☐ Yes ☐ No
b. Did you live with your spouse during any part of the last six months of 2021? ☐ Yes ☐ No

☐ Divorced Date of final decree ____________

☐ Legally Separated Date of separate maintenance decree ____________

☐ Widowed Year of spouse's death ____________

2. List the names below of:
- **everyone** who lived with you last year *(other than your spouse)*
- **anyone** you supported but did not live with you last year

If additional space is needed check here ☐ and list on page 3

Name *(first, last)* Do not enter your name or spouse's name below (a)	Date of Birth *(mm/dd/yy)* (b)	Relationship to you *(for example: son, daughter, parent, none, etc)* (c)	Number of months lived in your home last year (d)	US Citizen *(yes/no)* (e)	Resident of US, Canada, or Mexico last year *(yes/no)* (f)	Single or Married as of 12/31/21 *(S/M)* (g)	Full-time Student last year *(yes/no)* (h)	Totally and Permanently Disabled *(yes/no)* (i)	**To be completed by a Certified Volunteer Preparer** Is this person a qualifying child/relative of any other person? *(yes/no)*	Did this person provide more than 50% of his/her own support? *(yes,no,n/a)*	Did this person have less than $4,300 of income? *(yes,no,n/a)*	Did the taxpayer(s) provide more than 50% of support for this person? *(yes/no/n/a)*	Did the taxpayer(s) pay more than half the cost of maintaining a home for this person? *(yes/no)*

Check appropriate box for each question in each section

Yes	No	Unsure	Part III – Income – Last Year, Did You *(or Your Spouse)* Receive
☐	☐	☐	1. (B) Wages or Salary? (Form W-2) **If yes, how many jobs did you have last year?** ______
☐	☐	☐	2. (A) Tip Income?
☐	☐	☐	3. (B) Scholarships? (Forms W-2, 1098-T)
☐	☐	☐	4. (B) Interest/Dividends from: checking/savings accounts, bonds, CDs, brokerage? (Forms 1099-INT, 1099-DIV)
☐	☐	☐	5. (B) Refund of state/local income taxes? (Form 1099-G)
☐	☐	☐	6. (B) Alimony income or separate maintenance payments?
☐	☐	☐	7. (A) Self-Employment income? (Form 1099-MISC, 1099-NEC, cash, virtual currency, or other property or services)
☐	☐	☐	8. (A) Cash/check/virtual currency payments, or other property or services for any work performed not reported on Forms W-2 or 1099?
☐	☐	☐	9. (A) Income (or loss) from the sale or exchange of Stocks, Bonds, Virtual Currency or Real Estate? (including your home) (Forms 1099-S,1099-B)
☐	☐	☐	10. (B) Disability income? (such as payments from insurance, or workers compensation) (Forms 1099-R, W-2)
☐	☐	☐	11. (A) Retirement income or payments from Pensions. Annuities, and or IRA? (Form 1099-R)
☐	☐	☐	12. (B) Unemployment Compensation? (Form 1099G)
☐	☐	☐	13. (B) Social Security or Railroad Retirement Benefits? (Forms SSA-1099, RRB-1099)
☐	☐	☐	14. (M) Income (or loss) from Rental Property?
☐	☐	☐	15. (B) Other income? (gambling, lottery, prizes, awards, jury duty, virtual currency, Sch K-1, royalties, foreign income, etc.)

Yes	No	Unsure	Part IV – Expenses – Last Year, Did You *(or Your Spouse)* Pay
☐	☐	☐	1. (B) Alimony or separate maintenance payments? If yes, do you have the recipient's SSN? ☐ Yes ☐ No
☐	☐	☐	2. Contributions or repayments to a retirement account? ☐ IRA (A) ☐ 401K (B) ☐ Roth IRA (B) ☐ Other
☐	☐	☐	3. (B) College or post secondary educational expenses for yourself, spouse or dependents? (Form 1098-T)
☐	☐	☐	4. Any of the following? ☐ (A) Medical & Dental (including insurance premiums) ☐ (A) Mortgage Interest (Form 1098) ☐ (A) Taxes (State, Real Estate, Personal Property, Sales) ☐ (B) Charitable Contributions
☐	☐	☐	5. (B) Child or dependent care expenses such as daycare?
☐	☐	☐	6. (B) For supplies used as an eligible educator such as a teacher, teacher's aide, counselor, etc.?
☐	☐	☐	7. (A) Expenses related to self-employment income or any other income you received?
☐	☐	☐	8. (B) Student loan interest? (Form 1098-E)

Yes	No	Unsure	Part V – Life Events – Last Year, Did You *(or Your Spouse)*
☐	☐	☐	1. (A) Have a Health Savings Account? (Forms 5498-SA, 1099-SA, W-2 with code W in box 12)
☐	☐	☐	2. (A) Have credit card, student loan or mortgage debt cancelled/forgiven by a lender or have a home foreclosure? (Forms 1099-C, 1099-A)
☐	☐	☐	3. (A) Adopt a child?
☐	☐	☐	4. (B) Have Earned Income Credit, Child Tax Credit or American Opportunity Credit disallowed in a prior year? If yes, for which tax year? ______
☐	☐	☐	5. (A) Purchase and install energy-efficient home items? (such as windows, furnace, insulation, etc.)
☐	☐	☐	6. (A) Receive the First Time Homebuyers Credit in 2008?
☐	☐	☐	7. (B) Make estimated tax payments or apply last year's refund to this year's tax? If so how much? ______
☐	☐	☐	8. (A) File a federal return last year containing a "capital loss carryover" on Form 1040 Schedule D?
☐	☐	☐	9. (A) Have health coverage through the Marketplace (Exchange)? [Provide Form 1095-A]
☐	☐	☐	10. (B) Receive an Economic Impact Payment (stimulus) in 2021?
☐	☐	☐	11. (B) Receive Advanced Child Tax Credit payments?

Additional Information and Questions Related to the Preparation of Your Return

1. Would you like to receive written communications from the IRS in a language other than English? ☐ Yes ☐ No If yes, which language? ______
2. Presidential Election Campaign Fund *(If you check a box, your tax or refund will not change)*
   Check here if you, or your spouse if filing jointly, want $3 to go to this fund ☐ You ☐ Spouse
3. If you are due a refund, would you like: a. Direct deposit ☐ Yes ☐ No b. To purchase U.S. Savings Bonds ☐ Yes ☐ No c. To split your refund between different accounts ☐ Yes ☐ No
4. If you have a balance due, would you like to make a payment directly from your bank account? ☐ Yes ☐ No
5. Did you live in an area that was declared a Federal disaster area? ☐ Yes ☐ No If yes, where? ______
6. Did you, or your spouse if filing jointly, receive a letter from the IRS? ☐ Yes ☐ No

Many free tax preparation sites operate by receiving grant money or other federal financial assistance. The data from the following questions may be used by this site to apply for these grants or to support continued receipt of financial funding . Your answer will be used only for statistical purposes. These questions are optional.

7. Would you say you can carry on a conversation in English, both understanding & speaking? ☐ Very well ☐ Well ☐ Not well ☐ Not at all ☐ Prefer not to answer
8. Would you say you can read a newspaper or book in English? ☐ Very well ☐ Well ☐ Not well ☐ Not at all ☐ Prefer not to answer
9. Do you or any member of your household have a disability? ☐ Yes ☐ No ☐ Prefer not to answer
10. Are you or your spouse a Veteran from the U.S. Armed Forces? ☐ Yes ☐ No ☐ Prefer not to answer
11. Your race?
    ☐ American Indian or Alaska Native ☐ Asian ☐ Black or African American ☐ Native Hawaiian or other Pacific Islander ☐ White ☐ Prefer not to answer
12. Your spouse's race?
    ☐ American Indian or Alaska Native ☐ Asian ☐ Black or African American ☐ Native Hawaiian or other Pacific Islander ☐ White ☐ Prefer not to answer
    ☐ No spouse
13. Your ethnicity? ☐ Hispanic or Latino ☐ Not Hispanic or Latino ☐ Prefer not to answer
14. Your spouse's ethnicity? ☐ Hispanic or Latino ☐ Not Hispanic or Latino ☐ Prefer not to answer ☐ No spouse

Additional comments

______

______

______

______

______

______

______

Privacy Act and Paperwork Reduction Act Notice

The Privacy Act of 1974 requires that when we ask for information we tell you our legal right to ask for the information, why we are asking for it, and how it will be used. We must also tell you what could happen if we do not receive it, and whether your response is voluntary, required to obtain a benefit, or mandatory. Our legal right to ask for information is 5 U.S.C. 301. We are asking for this information to assist us in contacting you relative to your interest and/or participation in the IRS volunteer income tax preparation and outreach programs. The information you provide may be furnished to others who coordinate activities and staffing at volunteer return preparation sites or outreach activities. The information may also be used to establish effective controls, send correspondence and recognize volunteers. Your response is voluntary. However, if you do not provide the requested information, the IRS may not be able to use your assistance in these programs. The Paperwork Reduction Act requires that the IRS display an OMB control number on all public information requests. The OMB Control Number for this study is 1545-1964. Also, if you have any comments regarding the time estimates associated with this study or suggestion on making this process simpler, please write to the Internal Revenue Service, Tax Products Coordinating Committee, SE:W:CAR:MP:T:T:SP, 1111 Constitution Ave. NW, Washington, DC 20224

Form **15080** (October 2021)

Department of the Treasury - Internal Revenue Service

Consent to Disclose Tax Return Information to VITA/TCE Tax Preparation Sites

Federal Disclosure:

Federal law requires this consent form be provided to you. Unless authorized by law, we cannot disclose your tax return information to third parties for purposes other than the preparation and filing of your tax return without your consent. If you consent to the disclosure of your tax return information, Federal law may not protect your tax return information from further use or distribution.

You are not required to complete this form to engage our tax return preparation services. If we obtain your signature on this form by conditioning our tax return preparation services on your consent, your consent will not be valid. If you agree to the disclosure of your tax return information, your consent is valid for the amount of time that you specify. If you do not specify the duration of your consent, your consent is valid for one year from the date of signature.

Terms:

Global Carry Forward of data allows TaxSlayer LLC, the provider of the VITA/TCE tax software, to make your tax return information available to ANY volunteer site participating in the IRS's VITA/TCE program that you select to prepare a tax return in the next filing season. This means you will be able to visit any volunteer site using TaxSlayer next year and have your tax return populate with your current year data, regardless of where you filed your tax return this year. This consent is valid through November 30, 2023.

The tax return information that will be disclosed includes, but is not limited to, demographic, financial and other personally identifiable information, about you, your tax return and your sources of income, which was input into the tax preparation software for the purpose of preparing your tax return. This information includes your name, address, date of birth, phone number, SSN, filing status, occupation, employer's name and address, and the amounts and sources of income, deductions and credits that were claimed on, or contained within, your tax return. The tax return information that will be disclosed also includes the name, SSN, date of birth, and relationship of any dependents that were claimed on your tax return.

You do not need to provide consent for the VITA/TCE partner preparing your tax return this year. Global Carry Forward will assist you only if you visit a different VITA or TCE partner next year that uses TaxSlayer.

Limitation on the Duration of Consent: I/we, the taxpayer, do not wish to limit the duration of the consent of the disclosure of tax return information to a date earlier than presented above (November 30, 2023). If I/we wish to limit the duration of the consent of the disclosure to an earlier date, I/we will deny consent.

Limitation on the Scope of Disclosure: I/we, the taxpayer, do not wish to limit the scope of the disclosure of tax return information further than presented above. If I/we wish to limit the scope of the disclosure of tax return information further than presented above, I/we will deny consent.

Consent:

I/we, the taxpayer, have read the above information.

I/we hereby consent to the disclosure of tax return information described in the Global Carry Forward terms above and allow the tax return preparer to enter a PIN in the tax preparation software on my behalf to verify that I/we consent to the terms of this disclosure.

Primary taxpayer printed name and signature	Date
Secondary taxpayer printed name and signature	Date

If you believe your tax return information has been disclosed or used improperly in a manner unauthorized by law or without your permission, you may contact the Treasury Inspector General for Tax Administration (TIGTA) by telephone at 1-800-366-4484, or by e-mail at complaints@tigta.treas.gov.