

VALET VITA (aka Drop-O7) INFORMATION

PLEASE READ!

INSTRUCTIONS

WHAT TO PUT IN YOUR TAX ENVELOPE

- All tax documents
(See the back of the packet for the full list.
Remove papers from mailing envelopes.)
- Photo ID
(For you and your spouse, if married)
- Social Security cards
(For you, your spouse, and all dependents)
- Voided check for direct deposit or debit
 - The bank account must be in your name (or both names if married).
 - The IRS is phasing out paper checks.
 - Ask your preparer if you do not have a bank account.
- Completed Intake Forms
 1. Form 13614-C — Intake/Interview & Quality Review Sheet
 2. Form 14446 — Virtual VITA Consent Form (fill out page 3)
 3. The River Center Intake Form

YOUR INTAKE / INTERVIEW APPOINTMENT

- Bring your tax envelope with all items above.
- Review your forms and documents with the Volunteer Tax Preparer.
(You must sit with a volunteer before we can accept your documents.)
- The volunteer will make a list of the documents you leave with us.
(Copies of your ID and Social Security cards will be made.)
- Confirm your pick-up appointment date and time.
(Typically one week later, about 20 minutes after your first appointment time.)

Your Return Appointment:

| | |
|------|--|
| Date | |
| Time | |

WHAT HAPPENS NEXT

- A volunteer will prepare your tax return during the week.
- If you need to give us more documents, ask the volunteer how to get them to us.
- You (and your spouse) must come to your Return Appointment.
- You are responsible for your tax return.
- After you sign, we will e-file your return.
- If you are expecting a refund, wait at least 24 hours after e-filing to check Where's My Refund on irs.gov or call 1-800-829-1954

Documents Needed for VITA Tax Preparation (if applicable):

- Photo ID for you and/or spouse if filing jointly
- Social Security Cards or ITIN Letters for every member of your family listed on the return. This is required by the IRS. If you are known to the site, email taxes@rivercenternh.org or call (603) 924-6800 ext 30 to verify your information before your appointment if you do not have your SSN card(s) or a Form SSA-1099. If you did not have your 2024 tax return prepared by us in 2025, you must contact the social security administration to replace the card(s) prior to your appointment or go to <https://www.ssa.gov/number-card/replace-card/> to make an online request.
- Printed W-2s and/or 1099's from ALL of your jobs worked in 2025
- Health Insurance Documents – If you signed-up for health insurance through the Marketplace, you must bring the required 1095-A from them to complete your tax return. If you are a MA resident, you must bring 1099-HC from your private insurer unless you have Medicare or Mass Health.
- Unemployment Compensation – Form 1099G
- If self-employed, any related business expenses. You can download a copy of the form from our website at <https://rivercenternh.org/freetaxprep>.
- Interest/Dividend statements from your financial institutions (if applicable)-forms #1099 INT, 1099DIV
- Tuition and student loan information (if applicable) form 1098T and/or 1098E
- Documentation from your daycare provider: their SSN or EIN and amounts paid in 2025
- If you own a home, your annual mortgage interest statement *if itemizing*.
- VIN and Lender Statement showing amounts for No Tax on Car Loan Interest: on 2025 loans of new US-made vehicles for personal use at time of purchase only.
- A record of any taxes paid to the town (property taxes, automobile, etc.) *if itemizing*.
- Any other income information or IRS notices that you received
- Copy of your last year's tax return for improved accuracy of your 2025 tax return.
- If you would like to direct deposit, please bring a check or other form (including Chime, Venmo, or Cash App) that shows your account and routing number. Ask a VITA volunteer about direct deposit options.

If you need tax documents that are online or on your phone, they must be printed before your appointment.

Check your local library for print-on-demand service if you don't have a printer at home.