

CAPTAIN CHS  
VITA 2023 Tax Season  
Additional Questions

(please print clearly)

---- Name: \_\_\_\_\_

---- What school district do you live in? \_\_\_\_\_

---- Do you pay property taxes?      YES      NO

    If YES, please bring your 2023 tax receipts (county and school) with you.

    What was the amount of your STAR check? \_\_\_\_\_ (used to see if a NYS credit is available)

---- Do you pay rent?              YES      NO

    If YES, what is your monthly rent payment? \_\_\_\_\_ (used to see if a NYS credit is available)

---- Did you make contributions to a NYS 529 College Savings Plan in 2023?      YES      NO

    If YES, how much did you contribute? \_\_\_\_\_

---- Are you a volunteer firefighter or volunteer ambulance worker?      YES      NO

---- Banking information for direct deposit or direct debit

    Bring a voided check OR

    Bank Name: \_\_\_\_\_ Checking: \_\_\_\_\_ Savings: \_\_\_\_\_

    Bank Routing Number: \_\_\_\_\_

    Bank Account Number: \_\_\_\_\_

---- What is the best time of day for us to call you? \_\_\_\_\_

**SEE BACK FOR WHAT TO BRING TO YOUR APPOINTMENT ----->**

## BRING THE FOLLOWING ITEMS TO YOUR DROP-OFF APPOINTMENT

- Social Security cards for all people on the return
- Driver's licenses for you and your spouse
- Completed Intake Form – the yellow form
- Signed consent form (p.3 of the 3-page form)
- Only 2023 tax documents – W2s, 1099-SS's, 1099-R's, interest and dividend statements, HSA statements, tuition statements, etc. **Remove the documents from their envelopes.**
- Unemployment form – if you received unemployment compensation in 2023, you must bring the 1099G form with you. It may be mailed to you if you designated that online, otherwise you will need to logon to your account and print it out BEFORE you come to this appointment. Go to <https://dol.ny.gov/>.
- Property tax receipts (county and school) for 2023 if you pay property taxes
- Bank routing and account numbers if you want direct deposit of refund(s) or direct debit of payment(s)