

# SEVCA TAX SUPPLEMENTAL INTAKE QUESTIONNAIRE Tax Year 2021/22

Tax Client Name(s): \_\_\_\_\_

**Demographic Questions are required by our grant providers to provide this free service to our clients:**

**What was the highest grade completed for household members age 24 or older?**

0-8 Grade \_\_\_\_\_ 9-12 Grade-Non-Graduate \_\_\_\_\_ High School Graduate or GED \_\_\_\_\_ 12+ with Some College \_\_\_\_\_  
2 Or 4 years College Graduate \_\_\_\_\_ Graduated Post-Secondary School \_\_\_\_\_ Unknown\Not Reported \_\_\_\_\_

**Are there any members in your household ages 14-24 who are neither working nor in school during this year?**

Yes \_\_\_\_\_ or No \_\_\_\_\_ **If Yes, How Many?** \_\_\_\_\_

**Are you disabled?** Yes \_\_\_\_\_ No \_\_\_\_\_ **If married, is your spouse disabled?** Yes \_\_\_\_\_ No \_\_\_\_\_

**Do you have Health Insurance?** Yes \_\_\_\_\_ No \_\_\_\_\_

**What Type?** Employment Based \_\_\_\_\_ Medicaid \_\_\_\_\_ Medicare \_\_\_\_\_ Dr. Dinosaur \_\_\_\_\_

VT Health Connect or Marketplace Insurance of another State \_\_\_\_\_ Military Health Care \_\_\_\_\_ Direct Purchase \_\_\_\_\_  
Unknown \_\_\_\_\_

**NOTE: If you received an advance premium tax credit through Vermont Health Connect or any other State Marketplace Insurance, the client is responsible for providing the Tax Form 1095A. If client has not received the required form, contact your state marketplace provider. For a Vermont resident, please contact VT Health connect at (855) 899-9600.**

**Work Status of Tax Client(s):** Employed Full Time \_\_\_\_\_ Part Time \_\_\_\_\_ Seasonal Work \_\_\_\_\_ Un-Employed Short Term \_\_\_\_\_ Un-Employed Long Term (6 months +) \_\_\_\_\_ Unemployed (not in labor force at all) \_\_\_\_\_ Retired \_\_\_\_\_ Unknown/Not Reported \_\_\_\_\_

**Housing:** Own \_\_\_\_\_ Rent \_\_\_\_\_ Homeless \_\_\_\_\_ Living with friends/relatives \_\_\_\_\_ Other living arrangements \_\_\_\_\_

**Household Type:** Single \_\_\_\_\_ Two Adults (no children) \_\_\_\_\_ Two Adults (with children) \_\_\_\_\_

Single Parent (Female \_\_\_\_\_ Male \_\_\_\_\_) Roommates with Children \_\_\_\_\_ Multigenerational Household \_\_\_\_\_ Other \_\_\_\_\_

**Household Size:** Single \_\_\_\_\_ 2 \_\_\_\_\_ 3 \_\_\_\_\_ 4 \_\_\_\_\_ 5 \_\_\_\_\_ 6 or more \_\_\_\_\_

**Genders in Household:** Females Total \_\_\_\_\_ Males Total \_\_\_\_\_

**Household Ages:** 0-5 \_\_\_\_\_ 6-13 \_\_\_\_\_ 14-17 \_\_\_\_\_ 18-24 \_\_\_\_\_ 25-44 \_\_\_\_\_ 45-54 \_\_\_\_\_ 55-59 \_\_\_\_\_ 60-64 \_\_\_\_\_ 65-74 \_\_\_\_\_ 75+ \_\_\_\_\_  
Unknown/Not Reported \_\_\_\_\_

**Were you a VT Resident for the entire year of 2021?** Yes \_\_\_\_\_ No \_\_\_\_\_

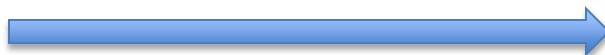
**If Part-Year Resident of Vermont indicate dates: From:** \_\_\_/\_\_\_/2021 **To:** \_\_\_/\_\_\_/2021

**If you lived in other states, please list the State(s)** \_\_\_\_\_

If more than one state, provide dates begin and end by State **From:** \_\_\_/\_\_\_/2021 **To:** \_\_\_/\_\_\_/2021

**From:** \_\_\_/\_\_\_/2021 **To:** \_\_\_/\_\_\_/2021

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# VERMONT RESIDENTS ONLY

Did you make any estimated tax payments to the State of Vermont in 2021? Yes \_\_\_\_\_ No \_\_\_\_\_

As a VT Resident, did you keep a record of any out-of-state purchases for which you paid no sales tax (either in person or online) during 2021? Yes \_\_\_\_\_ No \_\_\_\_\_ If not, do you want to use the assessed VT Sales Tax %? Yes \_\_\_\_\_ No \_\_\_\_\_

If you are a VT Resident and are owed a Vermont State Refund, would you like the refund applied to your 2022 state income taxes? Yes \_\_\_\_\_ No \_\_\_\_\_

Would you like your State Refund applied to your 2022 Residential State Property taxes? Yes \_\_\_\_\_ No \_\_\_\_\_

**Vermont Resident Homeowners:** Do you currently own and occupy a VT Home at a minimum of 183 days in 2021?

Yes \_\_\_\_\_ No \_\_\_\_\_

If Yes, will it be your domicile on April 1, of 2022? Yes \_\_\_\_\_ No \_\_\_\_\_

Is the property a mobile home? Yes \_\_\_\_\_ No \_\_\_\_\_ If yes, do you also own the land or lot on which it is located? Yes \_\_\_\_\_ No \_\_\_\_\_

**Vermont Residential Homeowners:** Primary Residential owners that are domicile in VT for a minimum of 183 days or more, must annually file a Homestead Declaration and may apply for a Property Tax Credit which is based on household income. To be able to file for a Property tax credit, a 2021 property tax bill is required. Owners of mobile homes who do not own the land on which it is located, need the 2021 property tax bill and the form LRC147 - showing the lot rent that was paid or a Nonprofit Mobile Home Park Certificate LRC147 for their share of the park's property taxes paid.

**Vermont Renters:** Will you be filing a Vermont Renter Credit Claim? Yes \_\_\_\_\_ No \_\_\_\_\_ (to qualify, you must have been a Vermont resident for the full year of 2021, not be claimed as dependent by another taxpayer and must have rented in VT for 6 months or more). *This tax year 2021, the renter no longer needs a landlord certificate, a Form RCC-146 is filed by the landlord to the State of Vermont. The credit will be based on the income and the number in the immediate family household of the individual filer. The total income of the individual's household and names and ss numbers must be reported if they have income which is no different than last year. This change now allows unrelated renters to receive individual credits.*

**Household Income:** Applications for benefits for Property Tax Credits require that all income taxable and non-taxable of each person be reported for the months they were in the household in 2021. This includes you, spouse/civil union partner, roommates and family members (including children) even if they file their own income tax returns and not considered as your dependents. Please list the additional household members along with SS numbers, dates of birth and the number of months they lived in your home on the 13496-C Intake form under additional comments or below:

**NOTE:** All individuals living in your household **MUST** be included on the Renter's Rebate and the Homestead Property Adjustment Claim as well as all of their income contributing to the household. Please put the number of months they lived in the household.

NAME \_\_\_\_\_ SS# \_\_\_\_\_ # of Months \_\_\_\_\_ INCOME \_\_\_\_\_

NAME \_\_\_\_\_ SS# \_\_\_\_\_ # of Months \_\_\_\_\_ INCOME \_\_\_\_\_

NAME \_\_\_\_\_ SS# \_\_\_\_\_ # of Months \_\_\_\_\_ INCOME \_\_\_\_\_

Please check all partially taxable and non-taxable incomes that apply to your household below:

Cash or Gifts over \$2,000 \_\_\_\_\_ Social Security, SSI, SSDI \_\_\_\_\_ Cash Public Assistance from State \_\_\_\_\_

Veterans benefits \_\_\_\_\_ Reach up Benefits \_\_\_\_\_ Workers Compensation \_\_\_\_\_ Profit on sale of Main Home \_\_\_\_\_

Child Support Money \_\_\_\_\_ Cash equivalent gifts (stocks, bonds, CDs and other items that are convertible to cash \_\_\_\_\_

**Charitable Donations:** Vermont allows a 5% nonrefundable credit on up to \$20,000 in contributions made to federally qualified charitable organizations even if the federal return does not include a Schedule A (itemized deductions) If you made contributions please provide them in your tax packet on a separate listing or provide receipts of contributions.