

SEVCA TAX SUPPLEMENTAL INTAKE QUESTIONNAIRE Tax Year 2022/23

These forms help our VITA Preparers spend less time asking questions over the phone with the Interview Process.

Tax Client Name(s): _____

If Part-Year Resident of Vermont indicate dates: From: ___/___/2022 To: ___/___/2022

If you lived in other states, please list the State(s) _____

If more than one state, provide dates begin and end by State From: ___/___/2022 To: ___/___/2022

From: ___/___/2022 To: ___/___/2022 (if more please advise or write in)

VERMONT RESIDENTS ONLY

Did you make any estimated tax payments to the State of Vermont in 2022? Yes _____ No _____

Use Tax: (Vermont collects sales tax for items purchased out-of-state or on the Internet)

VT Resident, did you keep a record of any out-of-state purchases that are considered taxable for which you paid no sales tax (either in person or online) during 2022? Yes _____ No _____

If not, do you want to use the assessed VT Sales & Use tax tables to compute your sales tax (0.05% of income) Sales Tax %? Yes _____ No _____

If yes, are you able to provide a list of these purchases? 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 Renters only:

To qualify for the Renter Credit, you must have been a resident of VT for all of 2022, rented for at least 6 months in 2022 (can be non-consecutive months) and your landlord(s) must have electronically filed a Landlord Certificate (LC-142) with the VT Department of Taxes. Beginning 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. **All Renters must answer the following questions below:**

Were you a legal resident of Vermont all of 2022? Yes ___ No ___

Was your rent subsidized? Yes ___ No ___

Were you claimed as a dependent by another taxpayer in 2022? Yes ___ No ___

Did you share rental unit with any adult other than your spouse/CU partner? Yes ___ No ___

Number of months rented in Vermont in 2022? _____ (6 or more months to qualify, can be more than one location rented within Vermont, if there is more than one apartment, please add in below)

Are you required to file a federal income tax return? Yes ___ No ___

Address On 12/31/2022 (or last date you rented in Vermont in 2022):

Full street address and zip code of rental location _____

Unit or Apt number _____ Town of rental location _____

The town property tax bill SPAN # (to be looked up by tax preparer) _____ **Turn to page 2**

Vermont Resident Homeowners:

Do you currently own and occupy a VT Home at a minimum of 183 days in 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: Homestead Declaration (homeowners only)

You must file a declaration by April 18, 2023, if you meet all of the following eligibility requirements: 1. Own the Vermont property as your principal residence as of April 1, 2023, AND 2. Expect to physically occupy the Vermont property as your domicile. The declaration must be filed even if it is late up until October 15, 2023. Homeowners also may apply for a property tax credit which is based on their household income and occupied by a resident individual as the individual's main home (domicile) on April 1, 2023.

As part of the Homestead Declaration please answer the following required questions:

Business use of dwelling? ___% of dwelling (leave blank if business use less than 25%)

Rental use of dwelling? ___% of dwelling

Business or rental use of Improvements or Other buildings? Yes ___ No ___

Special situations:

Are you the Grantor and sole beneficiary of revocable trust owning the property? Yes ___ No ___

Are you the Life estate holder of the property? Yes ___ No ___

Does your homestead property cross town boundaries? Yes ___ No ___

Are you residing in a dwelling on the homestead parcel owned by a related farmer? Yes ___ No ___

Property Tax Credit (homeowners only) The 2022 property tax bill is required. Owners of mobile homes who do not own the land on which it is located, need the 2022 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.

Please answer these three questions:

Were you domiciled in (legal resident of) Vermont all of 2022? Yes ___ No ___

Were you claimed as a dependent by another taxpayer in 2022? Yes ___ No ___

Do you anticipate selling this Vermont homesite on or before April 1, 2023? Yes ___ No ___

If more than one owner on the property tax bill, were all the owners of the property living in the household in 2022?

Yes ___ (100% ownership) No ___ (<100% unless others are descendants of taxpayer age 62+)

Household Income (homeowners only)

Applications for Property Tax Credit require that the **income (taxable and non-taxable) of each person** who lived in the home in 2022 be reported for the months they were members the household in 2022. Household members includes you, your spouse/civil union partner, roommates, and family members (including children) even if they file their own income tax returns and are not considered your dependents. You must include your spouse/civil union partner as a member of your household even if your spouse/civil union partner does not live with you in the same home. If, however, your spouse/civil union partner did not live with you and your spouse/civil union partner became divorced, legally separated, or have an active protection order in place at any time in 2022, then this person is not considered a household member in 2022.

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 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 above:

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

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VERMONT Charitable Donations: Please advise by a checkmark below if you're interested in donating to any of the VT charities below. Vermont allows a 5% nonrefundable credit on up to \$20,000 in contributions made to federally qualified charitable organizations, **even if you don't itemize on the federal return** (Schedule A - itemized deductions). If you made any contributions of this kind, please provide a list of organizations and amounts donated or receipts if you obtained them and include them in your tax folder.

Vermont filers wishing to contribute to any of the following Vermont Charities, **enter \$ amounts** below:

___ Non-game Wildlife ___ Children's Trust ___ VT Veterans ___ Green Up

(These amounts will add to your amount due or subtract from your refund)