

VERMONT INTAKE & INTERVIEW FORM

TAXPAYER NAME/S: _____

VERMONT NONRESIDENTS*	YES	NO	?
Did you have income from Vermont during the tax year such as wages or self-employment (even if not reported on a W-2, 1099-Misc or 1099-K)?			

*Nonresidents must file a Vermont return if there were any earnings from the state of Vermont.

FULL OR PART-YEAR RESIDENTS	YES	NO	?
Were you a Vermont resident for the entire year in 2019 ?			
If a part-year Vermont resident , indicate dates: From ____/____/____ to ____/____/____			
Did you make estimated tax payments to Vermont for the 2019 tax year?			
As a Vermont resident, did you keep a record of all out-of-state purchases for which you paid no sales tax (either in person or online) during 2019 ?			
If yes, are you able to provide a list of these purchases?			
If you are owed a state refund:			
Would you like the refund applied to your 2020 state income taxes?			
Would you like the refund applied to your 2020 property taxes?			

Owners of a domicile in Vermont must **annually** declare the property as their homestead (complete form HS-122, Part A). Property Tax Credit (Part B) is optional. **Seek advice regarding % of ownership.**

FULL-YEAR RESIDENT HOMEOWNERS	YES	NO	?
Do you currently own and occupy a Vermont home as your domicile?			
If yes , will it be your domicile on April 1 of 2020 ?			
If you rent out your home, will you occupy the property for 183 or more days in 2020 ?			
Is the property a mobile home?			
If yes , do you also own the land or lot on which it is located?			

For Property Tax Credit, a 2019 property tax bill is needed. Owners of mobile homes who do not own the land on which it is located, need the property tax bill and either a Landlord Certificate (for rent paid) or a Nonprofit Mobile Home Park Certificate (for their share of the park's property taxes paid). The tax preparer will complete HS-122 (Parts A and B) and HI-144 (Household Income). PR-141 is not used.

FULL-YEAR RESIDENT RENTERS	YES	NO	?
Did you rent in Vermont for a full 12 months during 2019 ?			
If yes , do you have a Landlord Certificate/s (Form LC-142)?			

To qualify for the Renter Rebate, the Landlord Certificate/s (LC-142) must total 12 months of occupancy during 2019. The preparer will complete Form PR-141 (Renter Rebate) and HI-144 (Household Income).

Household Income: Applications for benefits (Property Tax Credit or Renter Rebate) require that the **income (taxable and non-taxable) of each person** be reported for the months they were your household members in **2019**. This 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 dependents. You must include a 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** you and your spouse/civil union partner became divorced, legally separated, or have an active protection order in place at any time in 2019, then this person is not considered a household member. (Note: The Vermont Department of Taxes may request copies of these court documents.)

Please list the additional household members along with your dependents under Part II, No. 2 on the federal intake sheet, including their dates of birth, and the number of months they were present in the home. You must also provide their social security numbers.

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

Partial List of Non-taxable Income			
Cash or Gifts over \$2,000		Soc Sec, SSI, SSDI	Cash Public Assistance
Veterans Benefits		Reach Up Benefits	Workers Compensation
Profit on the Sale of Main Home		Support Money	Child Support
Cash Equivalent Gifts (stocks, bonds, CDs, & other items that are convertible to cash)			

Credit for 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 Sch A** (itemized deductions). If you made any contributions of this kind, please provide a list of organizations and amounts donated, or use the form below.

2019 Charitable Contributions			

Attach list of additional contributions if needed.

Optional Charitable Deductions for 2020

Vermont filers wishing to contribute to any of the following funds, may **enter amounts** below:

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

Credit for Itemized Medical Expenses:

Check if you have medical expenses to include in itemized deductions on your federal return.