

Drop Off Checklist

Use this checklist as a guide to make sure you are dropping off all necessary completed documents.

- Photo Identification (*Bring with you to be verified at time of Drop Off*)
- Social Security Cards (*for yourself and all dependents included on tax return*)
- IRS Virtual Consent Form (14446, *Signature required*) – *This form allows us to complete your return without you being present*
- IRS Intake Form (13614-C) – *Includes the following consent (last page form 15080)*
 - a. **Consent to Disclose Tax Return Information to VITA/TCE Tax Preparation Sites** (*Global Carry Forward*) located on the back of IRS Intake form – *Accept or Decline: This consent grants taxpayer information to be accessible globally across IRS VITA/TCE territory. If a VITA tax preparer at another VITA site key an incorrect social security number and the TP resides in Wisconsin, your information will be visible externally to non-SDC sites. Taxpayers are encouraged to decline this consent by not signing the form.*
- Intake Supplemental Form – *This form allows for the completion of an accurate return considering all applicable credits available*
- SDC Application (Signature required) - *Or complete online prior to visiting the site at <https://s13.cap60.com/kiosk3/Home/SetDBName/capSocialDevWI>*
- VITA TCE Pre-filing Checklist
- Consent Forms -(3) (*to use, disclose information - Signatures Required*)
 - a. **Consent to Use Personal Tax Return Information** - *Acceptance Required: This consent allows for the completion and transmission of the State of WI and Homestead returns.*
 - b. **Consent to Disclose Personal Tax Return Information** – *Acceptance Required: This consent enables SDC to report taxpayer information in the aggregate to our funding sources to continue to provide the services for free.*
 - c. **Consent to Disclose Information to Tax Preparer’s Regional Office** – *Acceptance Required: This consent provides approval for the software company to disclose taxpayer information to the main office (North Ave)*
- ALL income related documents
- Marketplace Coverage – *You must bring in form 1095A. This reconciles the advance premium tax credit received during the tax year (form 8962) to determine if you are eligible for additional premium tax credit or if you were overpaid the advanced PTC*

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- School documents (School Account Statement - tuition *(1098T)*, expenses (books), interest paid *(1098E)*)
- Property Tax Bill *(detailed- payment receipt not accepted)*
- Rent Certificate *(if filing Homestead)*
- COVID Retirement Distribution *(Form1099R)* Worksheet - must be included if there was an early withdrawal taken