

# VITA Drop Off Instructions

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To find out how to submit your information online (contactless) go to <https://vitaocpl.com>

## FILL OUT THE REQUIRED PAPERWORK

- ❖ Form 14446:
  - Page 3 – This is your consent for us to do your taxes using this process.
    - Provide a valid telephone number.
    - You **AND** your spouse (if applicable) **must BOTH sign** and date the form.
  - Pages 1 and 2 will be reviewed with you during your first appointment.
- ❖ Form 13614-C (Yellow Intake sheet)
  - Fill out the first 3 pages.
- ❖ Taxpayer Questionnaire
  - Complete the **ADDITIONAL PERSONAL INFORMATION** section.
  - Complete the **STATE RESIDENCY** section.
  - Complete the other sections that apply to you and/or your spouse.
- ❖ **Enclose everything in your IRS envelope\***
  - All the forms you filled out
  - All 2023 Tax Forms you received and anything else you think we might need to know to complete your return

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## SCHEDULE AN APPOINTMENT

At this appointment we will go over your forms with you and you will provide the required identification documents (see below). To schedule an appointment call and speak with a person at the desk. Do not leave a message.

**WE DO NOT LISTEN TO OR RETURN MESSAGES.**

**Call 304-232-8985 during these hours**

<b>Monday</b>	<b>10:00 AM – 5:00 PM</b>
<b>Tuesday</b>	<b>Closed</b>
<b>Wednesday</b>	<b>10:00 AM – 4:00 PM 5:00 PM – 8:00 PM</b>
<b>Thursday</b>	<b>10:00 AM – 5:00 PM</b>
<b>Friday</b>	<b>10:30 AM – 4:00 PM</b>
<b>Saturday</b>	<b>9:30 AM – 2:00 PM</b>

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## SHOW UP FOR YOUR APPOINTMENT

### Bring with you:

- Your completed packet
- Your State ID and that of your spouse (if applicable)
- Social security cards for everyone whose name appears on your tax return. You may bring a copy of all your IDs and cards **OR** we can copy them for you during your appointment.

\*If you downloaded your forms, you will receive your envelope during your first appointment