

ADDITIONAL FEDERAL AND STATE INFORMATION
UWHC VOLUNTEER INCOME TAX ASSISTANCE (VITA) 2025

1. Prior-Year Filing

Did UWHC complete your tax return last year? Yes No

2. State Residence

What was is your primary State of Residence in 2025 (6+ months)?

New Jersey Pennsylvania Other: _____

Did you live in the State checked above all 12 months in 2025? Yes No

If NO, please provide the date you moved in or out:

Moved into _____ (MM/DD/YY) Moved out of _____ (MM/DD/YY)

3. Employment

Did you physically work in Pennsylvania at any time in 2025? Yes No

If yes, what is your employer's work address? _____

4. Housing and Property (NJ Residents Only)

Do you RENT or OWN your NJ residence in 2025?

Rent Own Neither Monthly rent: \$ _____

Rented all 12 months in 2025? Yes No (If not, how many months? _____)

Did you receive the ANCHOR rebate?

Yes No If yes, how much per payment? 1) _____ 2) _____

Are you in the Property Tax Reimbursement (Senior Freeze/Blue Book) Program?

Yes No If yes, what is your base property tax amount? \$ _____

Municipality and County where you live: _____

5. Health & Disability

Did everyone on your return have health insurance for all of 2025? Yes No

If NO, who did not have insurance and when did they HAVE insurance?

Name 1: _____ List months with insurance: _____

Name 2: _____ List months with insurance: _____

Name 3: _____ List months with insurance: _____

Name 4: _____ List months with insurance: _____

Are you or your spouse considered DISABLED by the State of NJ?

Yes No Unsure

If yes, who is disabled? _____

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6. Medical Expenses (Paid Out-of-Pocket)

<u>Medical Expense</u>	<u>Total for 2025</u>
Medical Insurance Premiums (not Medicare)	_____
Supplemental Medicare Premiums	_____
Dental Insurance Premiums	_____
Vision Insurance Premiums	_____
Doctor/Dentist/Vision/Hospital Co-Pays	_____
Prescriptions	_____
Total Medical Miles	_____

7. Charitable Contributions

Did you make any charitable contributions in 2025?

Yes No Cash/Check Amount: \$ _____ In-kind/Items: \$ _____

8. NEW Car Loan Interest

Did you purchase a NEW (not used) car in 2025? Yes No

Date of Purchase _____ Car Loan Interest paid in 2025 _____

VIN # _____ (bring the car registration or insurance card)

9. Overtime Pay

Were you paid Overtime in 2025? Yes No

Total 2025 Overtime Pay: _____ Overtime Rate: 1.5X 2X Other

Bring employer statement and/or final paystub to verify overtime pay / pay rate

10. Estimated Tax Payments

Did you pay estimated quarterly taxes for 2025 return?

Yes No If yes, how much did you pay? IRS: \$ _____ State: \$ _____

11. Direct Deposit (Refunds)

The IRS will now hold your refund for 6+ weeks if you do not provide Direct Deposit info

Bring a check or use your banking App during the appointment to ensure accuracy

- Bank Name: _____
- Type of Account (circle): **CHECKING / SAVINGS**
- Routing Number: _____ Account Number: _____

QUESTIONS?  taxes@uwhunterdon.org  (908) 237-1689