

## VITA: 2022 Wisconsin Information Sheet

**TAXPAYER NAME:** \_\_\_\_\_

**DATE:** \_\_\_\_\_

- 1 Did you (and your spouse) live in Wisconsin for **ALL** of 2022?..... Yes  No  
 County: \_\_\_\_\_ School District: \_\_\_\_\_ Municipality: \_\_\_\_\_  City  Town  Village
  
- 2 Did you make Estimated Payments to the Wisconsin Department of Revenue?..... Yes  No
  
- 3 Did you pay Medical Insurance Premiums in 2022?..... Yes  No
  - a. **If yes**, were premiums paid **BEFORE** taxes were deducted?  
 Note: (Most employers deduct medical premiums **BEFORE** tax)  Yes  No
  
  - b. **If 3.a. is No**, enter **after-tax annual** Medical Premiums
 

(1) Medicare Parts A, B, C, D (SSA-1099)	\$ _____
(2) Medicare Supplemental Insurance:	\$ _____
(3) Health Insurance: Non-Marketplace (ex: COBRA)	\$ _____
(4) Health Insurance: Marketplace (1095-A: Column A – Column C)	\$ _____ (Figure <u>not</u> Final)
(5) Dental Insurance:	\$ _____
(6) Vision Insurance:	\$ _____
(7) BadgerCare Insurance	\$ _____
  
- 4 Were you (or your spouse) age 65 as of December 31, 2022?  Yes  No **If Yes:** Preparer completes Retirement Exclusion Worksheet
  
- 5 Long-term Care Insurance premiums in 2022?..... Yes  No  
 If Yes: Taxpayer: \$ \_\_\_\_\_ Spouse: \$ \_\_\_\_\_
  
- 6 Did you pay Tuition for Private Schools for elementary or high school students paid in 2022?..... Yes  No
  
- 7 Did you contribute to a Wisconsin EdVest or Tomorrow's Scholar account?..... Yes  No
  
- 8 Do you have Wisconsin Capital Loss Carryforwards (from 2021 Schedule WD)?..... Yes  No  
 If Yes: Short-Term (Line 34): \$ \_\_\_\_\_ Long-Term (Line 39): \$ \_\_\_\_\_
  
- 9 Did you pay Tuition and Fees to a Wisconsin or \*Minnesota college or vocational school in 2022?..... Yes \$ \_\_\_\_\_  No  
 (\*Minnesota includes only a public vocational school or public institution of higher learning)
  
- 10 Did you pay rent for your Primary Residence in 2022?  Yes \$ \_\_\_\_\_ (annual amount)  No  
 Was heat included in rent?..... Yes  No
  
- 11 Did you pay Property Taxes for your Primary Residence in 2022?  Yes \$ \_\_\_\_\_  No  
 Do **not** include **assessments, trash pick-up, recycling fees, etc.**
  
- 12 Did you purchase/sell your Primary Residence in 2022? We will need a copy of closing statement(s)..... Yes  No
  
- 13 Do you own your home with someone other than spouse?..... Yes  No  
 If Yes: Percentage of ownership: \_\_\_\_\_ Did they live with you?..... Yes  No
  
- 14 Did you buy anything outside of Wisconsin for which no sales tax was charged?  Yes \$ \_\_\_\_\_  No
  
- 15 Are you claiming Veteran's & Surviving Spouse Property Tax Credit?..... Yes  No  
 Amount of Property Taxes Paid in 2022? \$ \_\_\_\_\_ Acreage: \_\_\_\_\_
  
- 16 Did you receive Military/Uniform Services Retirement payments in 2022 (Dept of Defense)?..... Yes  No
  
- 17 Did you receive payments from any one of the following?
 

Federal Retirement (U.S. Office of Personnel).....	<input type="checkbox"/> Yes <input type="checkbox"/> No
Milwaukee ONLY: City/Police/Fire Fighters/County/Public School/Sheriff.....	<input type="checkbox"/> Yes <input type="checkbox"/> No
Wisconsin Teachers Retirement.....	<input type="checkbox"/> Yes <input type="checkbox"/> No

 If yes to any of these, were you 1) Retired from system before 1/1/64, or 2) Member of system on 12/31/63,  
 or a Beneficiary of an individual who met 1) or 2)?..... Yes  No

**(See Reverse Side for WI Homestead Credit)**

# VITA: 2022 WI Homestead Credit Information Sheet

1. Are you claiming WI **Homestead Credit**? .....  Yes  No

**If NO: you do not need to complete the rest of the questions.**

2. If renter, do you have a Completed Rent Certificate (no errors or corrections visible)?.....  Yes  No

3. If homeowner, provide copy of your **2022** Property Tax Bill (whether paid or not)?.....  Yes.... Acreage: \_\_\_\_\_  No

4. Provide the following information:

a. Federal SSI (Do not include your children's SSI) .....  Yes \$ \_\_\_\_\_  None

*Note: Call 1-877-694-5495 to obtain letter of annual amount received if you do not have this information*

b. WI SII (Do not include your children's SSI) .....  Yes \$ \_\_\_\_\_  None

*Note: Call 1-800-362-3002 to obtain letter of annual amount received if you do not have this information*

c. Caretaker Supplement.....  Yes \$ \_\_\_\_\_  None

*Note: Call 1-800-362-3002 to obtain letter of annual amount received if you do not have this information*

Total SSI/Caretaker Supplement (a+b+c) ..... \$ \_\_\_\_\_  None

d. VA Disability Benefits.....  Yes \$ \_\_\_\_\_  None

e. Scholarships/Fellowships/Grants/VEAP/GI Bill.....  Yes \$ \_\_\_\_\_  None

f. Court ordered Child Support, Maintenance or other support received in 2022.  Yes \$ \_\_\_\_\_  None

g. Wisconsin Works or County Relief.....  Yes \$ \_\_\_\_\_  None

Number of months you did NOT receive a WI payment: \_\_\_\_\_

h. Kinship Care/Other Public Assistance.....  Yes \$ \_\_\_\_\_  None

i. Workers Comp, Income Continuation, Loss of Time Pay.....  Yes \$ \_\_\_\_\_  None

j. Gain on Sale of home.....  Yes \$ \_\_\_\_\_  None

k. Resident Manager and received a rent reduction.....  Yes \$ \_\_\_\_\_  None

l. Stock Losses? Volunteer will calculate any disallowed losses.....  Yes \$ \_\_\_\_\_  None

m. Are you under 62 as of 12/31/2022 with no earned income (W-2 or self-employment) .....  Yes  No

**If Yes:** You must provide one of the following:

Statement from Veterans Administration certifying you are receiving disability benefits due to 100% disability

Document from Social Security Administration stating date disability began or

Physician's Statement indicating the date disability began and whether disability is permanent or temporary

n. Was your income low in relation to rent paid? Or was your income less than rent? .....  Yes  No

If Yes: Need note explaining how rent was paid \_\_\_\_\_

o. Did you have less than 12 months of rent? .....  Yes  No

If Yes: Indicate addresses and why \_\_\_\_\_

p. Did you move during the year? .....  Yes  No

If Yes: Indicate Addresses: \_\_\_\_\_

q. Did you pay personal property taxes on a mobile home?.....  Yes  No

If Yes: Are taxes on rent certificate?.....  Yes  No

r. Is there more than 1 occupant in rental unit and you are claiming more than your equal share of rent?  Yes  No

If Yes: Complete Shared Living Expenses Worksheet on back of Rent Certificate

Additional Information:

\_\_\_\_\_

\_\_\_\_\_