

Client Additional Questionnaire

Soldier's Name _____ First _____ MI _____ Last _____ SSN: _____

Spouse's Name _____ SSN: _____

Child's Name _____ SSN: _____

Military Retire: Y / N If so, as of (mm/dd/yyyy) _____ Current job title _____

Spouse Retired: Y / N If so, as of (mm/dd/yyyy) _____ Current job title _____

How do you know of this Tax Center (Please circle below)

Previous Years Guardian Marquee Radio TV Unit Friend Website Other

Did you and/or your spouse receive income from the following sources?

Y N N/A Royalties? / K1?

Y N N/A Did your children receive interest and dividends that you wish to claim on your own tax return instead of your child's (include Alaska fund)? Form 8814 \$ _____

Did you or your spouse sell or dispose of any of the following property?

Y N N/A Cash any U.S. Savings Bonds (EE or I Series) to pay for post-secondary education for yourself, spouse or dependents? \$ _____

Y N N/A Stock, mutual fund, or any other non-business related security?

Y N N/A Property relating to a business or farm to include rental property?

Additional Questions:

Y N N/A Are you or your spouse active duty military, Reservist or National Guard? (circle)

Y N N/A Will an Injured Spouse Form 8379 need to be done? For: Taxpayer / Spouse

Y N N/A If you owe do you want to do an Installment Agreement? (Form 9465)

Y N N/A Do you have a signed Form 8332 from the custodial parent to claim the dependent(s)?

Y N N/A Are you a Native American and receive income? \$ _____

Y N N/A First time home buyers credit (Form 5405) from purchase in 2008?

Y N N/A If married on 12/31/2013, do you plan on filing Married Filing Separately for 2013?