

Client Questionnaire

I understand that this is a free service by Volunteers. I will be patient and treat Volunteers with courtesy and respect.

Name _____ SSN _____

Military Retired? Y / N If so, as of (mm/dd/yyyy) _____

Y N Will an Injured Spouse Form 8379 need to be done? For T / S

Y N If you owe, do you want to do an Installment Agreement? Form 9465

Y N Is there a signed Form 8332 or a divorce decree that allows taxpayer to claim the dependents?

Y N Was EITC previously disallowed? Form 8862 must be completed.

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

Y N Royalties / K1

Y N Were any dividends received from the Alaska Fund? Use Form 8814 for children.

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

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

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

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

Do you need assistance with preparing state tax returns? Y / N

Name of State (s) _____ COUNTY _____ School District _____

Would you like your refund direct deposited into your bank account? Y / N

Bank Routing Number: _____ Bank Account Number _____ checking/savings

Louisiana Residents: Did you pay within your homeowners insurance the "Fair Plan Regular Assessment" or "Costal Plan Regular Assessment"? Please show your policy of the tax year.

When you are done filling out this questionnaire, please go to the screening area with all corresponding documents.

INTERNAL USE ONLY

Screeener: _____ Prepared by: _____

State(s) Prepared: _____