

Client Additional Questionnaire

Soldier's Name _____ First MI Last SSN: _____

Spouse's Name _____ SSN: _____

Child's Name _____ SSN: _____

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

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

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 or a retiree?

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? 2009? 2010?

Y N N/A If married on 12/31/2011, do you plan on filing Married Filing Separately for 2011?

Would you like your refund direct deposited into your bank account or split into two accounts?

Bank routing number _____ Bank account Number: _____ Checking / Savings

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State Questions

What is your Home of Record? _____

Where is your legal State residence? _____ County/Parish _____ School District _____

Spouse's State(s) _____ County _____ School District _____

Where were you stationed last year? _____

Does the spouse wish to claim Military Spouse (MSRRA) and have his/her wages excluded from Louisiana and reported to his/her legal State of residence? Y N N/A

LOUISIANA RESIDENTS

Y N Did you pay within your homeowners insurance the "FAIR Plan Regular Assessment" or "Costal Plan Regular Assessment"? Please show your policy.

Y N Did you earn military income outside of Louisiana? Please show your orders and LES.

When you are done filling out this questionnaire, please wait for the Screener to call you back to the Screening Area. Please have all of your tax documents readily available for the Screener.

Screener: _____ Prepared by: _____ State(s) prepared _____