



# Help Us Prepare an Accurate Return for You!

- Complete your Intake/Interview Sheet: all items in Section A, Parts I through V; see some useful tips below.
- If you have a question about an item, ask the tax preparer to explain it before starting your return.
- Review all your information with the tax preparer for accuracy.
- Actively participate in an interview and the quality review of your return.

Form **13614-C** (Rev. 10-2010) Department of the Treasury – Internal Revenue Service  
**Intake/Interview & Quality Review Sheet** OMB # 1545-1964

### Section A. Page 1 and Page 2 to

Enter names as shown on Social Security cards or ITIN letters

Address where we can send your refund; phone or e-mail where we can reach you if there are processing problems.

If you are not a U.S. citizen, we will ask you a few questions to determine which tax form you should use.

Be sure to enter exact dates. Incorrect birth dates may cause processing delays

- Tax information such as Forms
- Social Security cards or ITIN letters
- Proof of Identity (such as driver's license or other picture ID).

### Personal Information

Name	M. I.	Last Name	Are you a U.S. Citizen? <input type="checkbox"/> Yes <input type="checkbox"/> No
First Name	M. I.	Last Name	Is spouse a U.S. Citizen? <input type="checkbox"/> Yes <input type="checkbox"/> No

Enter job title or situation, e.g. nurse, student, retired.

If you are unsure, ask your tax preparer to explain.

3. Mailing Address	State	
4. Phone Primary:	Other:	E-mail
5. Your Date of Birth	6. Your Occupation	7. Are you Legally Blind <input type="checkbox"/> Yes <input type="checkbox"/> No
9. Spouse's Date of Birth	10. Spouse's Occupation	8. Totally and Permanently Disabled <input type="checkbox"/> Yes <input type="checkbox"/> No
		11. Is Spouse Legally Blind <input type="checkbox"/> Yes <input type="checkbox"/> No
		12. Totally and Permanently Disabled <input type="checkbox"/> Yes <input type="checkbox"/> No

These questions are asked by the IRS to gather information on the population served by our partners. The results could mean additional partner funding to assist identified segment groups.

13. Can your parents or someone else claim you or your spouse on their tax return? <input type="checkbox"/> Yes <input type="checkbox"/> No
14. Other than English what language is spoken in your home? _____
15. Are you or a member of your household considered disabled? <input type="checkbox"/> Yes <input type="checkbox"/> No

### Part II. Family and Dependent Information

1. As of December 31, 2010, your marital status was:

Single

Married: Did you live with your spouse during any part of the last six months of 2010?  Yes  No

Divorced or Legally Separated: Date of final decree or separate maintenance agreement: \_\_\_\_\_

Widowed: Year of spouse's death: \_\_\_\_\_

Legal marriages recognized by the federal government for tax purposes.

2. List the name of everyone below who lived in your home and outside your home that you supported during 2010. If additional space is needed please check here and use page 4 for additional information.

List all names as shown on Social Security cards or ITIN letters:

- Everyone who lived in your home except you and your spouse
- Anyone who lived elsewhere who you helped support

(a)	(b)	(c)	(d)	(e)	(f)	(g)	(h)
(first, last) of your name or name below.	Date of Birth (mm/dd/yy)	Relationship to you (e.g. son, mother, sister)	Number of months lived in your home	US Citizen or resident of the US, Canada or Mexico (yes/no)	Single as of 12/31/10 (yes/no)	Full-time student (yes/no)	Received more than \$3650 in income (yes/no)

Use page 4 to note additional information for the tax preparer.

Be sure to enter either "yes" or "no" for each person listed. Do not leave blank

- Volunteers assisting with preparing your return are trained to provide high quality service and uphold the IRS's commitment to the public.
- To report a problem with your preparer, please call Toll Free 1-877-330-1205 or email [taxpreparerhelp@irs.gov](mailto:taxpreparerhelp@irs.gov)

List the cumulative number of months in your home, including temporary absences.

If not a U.S. citizen, the tax preparer will help determine residency for tax purposes.

Catalog Number 52121E



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- Answer all questions in Parts III, IV, and V either 'yes', 'no' or 'unsure'. Your preparer will help you with any 'Unsure' questions.
- Have documents showing income or expense amounts ready.
- Note additional information and questions on page 4.

## Section A. To be completed by Taxpayer (continued)

### Part III. Income – In 2010, did you (or your spouse) receive: (Check Yes, No or Unsure to all questions below)

Yes No Unsure

- 1. Wages or Salary? (Form(s) W-2)
- 2. Tip Income?
- 3. Scholarships? (Forms W-2, 1098-T)
- 4. Interest/Dividends from: checking/savings accounts, bonds, CDs, brokerage? (Forms 1099-INT, 1099-DIV, 1099-OID)
- 5. Refund of state/local income taxes previously used? (Form(s) 1099-G)
- 6. Alimony Income?
- 7. Self-Employment Income/Loss (such as earnings from contract labor, small business)? (Form(s) 1099-MISC)
- 8. Income (gain or loss) from the sale of Stocks, Bonds or Real Estate (including your home)? (Form(s) 1099-B)
- 9. Disability Income (such as payments from SSA, VA, insurance, etc)? (Forms 1099-SSA, 1099-VA, 1099-B, 1099-INT, 1099-DIV, 1099-OID)
- 10. Distributions from Pensions, Annuities, and/or IRA? (Form(s) 1099-R)
- 11. Unemployment Compensation? (Form(s) 1099-G)
- 12. Social Security or Railroad Retirement Benefits? (Form(s) SSA-1099)
- 13. Income (profit or loss) from Rental Property?
- 14. Other Income: (gambling, lottery, prizes, awards, jury duty, etc.) Specify: \_\_\_\_\_ (Forms W-2 G, 1099-MISC)

Be sure you have a Form W-2 for every job you worked. If you didn't receive one, let us know.

Alimony or child support? We can help you determine which.

Self-Employment? Have income and expense amounts ready.

Include all income not noted in 1-13, whether or not it's shown on a statement.

Be sure to include amounts in Box 12 of Form W-2.

### Part IV. Expenses – In 2010 Did you (or your spouse) pay: (Check Yes, No or Unsure to all questions below)

Yes No Unsure

- 1. Alimony: If yes, do you have the recipient's SSN?  Yes  No
- 2. Contributions to a retirement account?  IRA  Roth IRA  401K  Other
- 3. Educational expenses paid for yourself, spouse or dependents? (such as tuition, books, fees, etc.)
- 4. Unreimbursed employee business expenses (such as mileage)?
- 5. Medical expenses?
- 6. Real estate mortgage interest?
- 7. Real estate taxes for your home or personal property taxes?
- 8. Charitable contributions?
- 9. Child/dependent care expenses that allowed you and your spouse, to work or to look for work?

Have daycare provider's Tax ID number available.

Foreclosure or debt cancellation? Check with site staff to ensure we have the training to serve you.

Please give your preparer copies of your purchase receipts.

Yes No Unsure

- 1. Have a Health Savings Account? (Forms 5498-SA, 1099-SA)
- 2. Have debt from a mortgage or credit card canceled/forgiven by a commercial lender? (Form(s) 1099-C)
- 3. Buy a home? If yes, closing date \_\_\_\_\_
- 4. Have Earned Income Credit (EIC) disallowed in a prior year? If yes, for which tax year? \_\_\_\_\_
- 5. Purchase and install energy efficient home items? (such as windows, furnace, insulation, etc.)
- 6. Live in an area that was affected by a natural disaster? If yes, where? \_\_\_\_\_
- 7. Receive the First Time Homebuyers Credit in previous years?
- 8. Pay any student loan interest?
- 9. Make estimated tax payments or apply last year's refund to your 2010 tax? If so how much? \_\_\_\_\_
- 10. If you are due a refund, would you like a direct deposit or split your refund?
- 11. If you are due a refund, would you like information on how to purchase U.S. Savings Bonds?
- 12. If you have a balance due, would you like information about all of your payment options? (such as payment directly from your bank account, check, money order, credit/debit card or pre-

If you're unsure of the amount, we can help you get it from IRS.

We'll need your account and routing numbers.

You may use your refund to purchase U.S. Savings Bonds.

Tell us if you'd like your refund deposited to more than one account.