



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

Ingrese los nombres según aparecen en las tarjetas de Seguro Social o las cartas de ITIN.

Asegúrese de ingresar las fechas correctas. Las fechas de nacimiento incorrectas pueden ocasionar retrasos de procesamiento.

La dirección postal a la cual podamos enviarle su reembolso, y el número telefónico o la dirección electrónica mediante los cuales podamos comunicarnos con usted si surge algún problema de procesamiento.

Si no es ciudadano estadounidense, le haremos algunas preguntas para determinar cuál formulario tributario deberá utilizar.

Si no está seguro, pídale a su preparador de declaraciones de impuestos que se lo explique.

El IRS hace estas preguntas para recopilar información sobre el público al que nuestros socios prestan servicios. Los resultados podrían representar financiamiento adicional para que nuestros socios puedan ayudar a ciertos grupos identificados.

Personal Information

1. First Name: _____ M. I.: _____ Last Name: _____
 Are you a U.S. Citizen? Yes No

2. First Name: _____ M. I.: _____ Last Name: _____
 Is spouse a U.S. Citizen? Yes No

3. Mailing Address: _____ State: _____
Indique su puesto o situación de trabajo; por ejemplo, enfermera, estudiante,

4. Phone Primary: _____ Other: _____ E-mail: _____

5. Your Date of Birth: _____ 6. Your Occupation: _____ 7. Are you Legally Blind Yes No

8. Totally and Permanently Disabled Yes No

9. Spouse's Date of Birth: _____ 10. Spouse's Occupation: _____ 11. Is Spouse Legally Blind Yes No

12. Totally and Permanently Disabled Yes No

13. Can your parents or someone else claim you or your spouse on their tax return? Yes No

14. Other than English what language is spoken in your home? _____

15. Are you or a member of your household considered disabled? Yes 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: _____

Matrimonios legales reconocidos por el gobierno federal para fines tributarios.

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.

(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)

Ingrese todos los nombres según aparecen en las tarjetas de Seguro Social o las cartas de ITIN:

- Todas las personas que hayan vivido en su hogar, excepto usted y su cónyuge.
- Cualquier persona que haya vivido en otro lugar pero a quien usted ayudó a mantener.

Use la página 4 para indicar información adicional sobre el contribuyente.

Asegúrese de indicar "sí" o "no" para cada persona de la lista. No deje nada en blanco.

• 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

Indique la cantidad acumulativa de meses en su hogar, incluidas las ausencias temporales.

Catalog Number 52121E

Si no es ciudadano estadounidense, el preparador de declaraciones de impuestos le ayudará a determinar su condición de residente para fines tributarios.



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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-BEN)
- 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)

Asegúrese de tener un Formulario W-2 para cada empleo en el que haya trabajado. Si no recibió uno, avísenos.

¿Pensión alimenticia o pensión para hijos menores? Podemos ayudarle a determinar de cuál se trata.

¿Trabajo por cuenta propia? Tenga listos los montos de ingresos y gastos.

Incluya cualquier ingreso que no figure en el renglón 1-13, independientemente de que figure en una declaración.

Asegúrese de incluir los montos de la Casilla 12 del Formulario 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. Home 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?

Tenga listo el número de identificación de contribuyente del proveedor de cuidado infantil.

¿Ejecución hipotecaria o cancelación de la deuda? Verifique con el personal del sitio para ver si tiene la capacitación necesaria para ayudarle.

Part V. Refunds – In 2010 Did you (or your spouse): (Check Yes, No or Unsure to all questions below)

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-authorized debit card)

Entregue copias de sus recibos de compra al preparador.

Necesitaremos el número de su cuenta y el número de tránsito bancario.

Si no está seguro del monto, podemos ayudarle a obtenerlo del IRS.

Puede usar su reembolso para comprar Bonos de Ahorro de los EE.UU.

Díganos si desea que porciones de su reembolso se depositen en cuentas distintas.