

INTAKE/INTERVIEW & QUALITY REVIEW SHEET

TAXPAYER(S) INFORMATION

Name:		
Date of birth:	Last 4 of SSN:	Phone:
Current Address:		
City:	State:	ZIP Code:
Spouse's Name:	Last 4 of SSN:	Date of Birth:
Your Job Title:	Are you a U.S citizen?	Email:
Spouse's Job Title:	Is your spouse a U.S citizen?	Spouse's Email:

MARITAL STATUS AND HOUSEHOLD INFORMATION

FILING STATUS:

- SINGLE: This includes registered domestic partnerships, civil unions, or other formal relationships under state law)
- MARRIED: *Did you live with your spouse during any part of the last six months? *Was your marriage recognized under the law?
- DIVORCED or LEGALLY SEPARATED: Date of final decree or separate maintenance agreement _____
- WIDOWED: Year of spouse's death _____
- HEAD OF HOUSEHOLD: Do you pay for more than half of the household expenses? _____

DEPENDENT(S) INFORMATION

List the names below of:

- Everyone who lived with you last year (other than you or your spouse)
- Anyone you supported but did not live with you last year

Name	Last 4 of SS #	Relationship to you?	Date of Birth MM/DD/YYYY	Number of months lived in your home last year?	Full Time Student? Y/N	Permanantly Disabled? Y/N

INCOME

Last Year, Did You (or Spouse) Receive: (Please put a √ next to all that applies to you and/or your spouse)

- Wages or Salary? (W-2 Form)
- Tip Income?
- Scholarships, Loans, or Financial Aid? (1098-T Form)
- Interest/Dividends from: checking/savings accounts, bonds, CDs, brokerage? (Forms 1099-INT, 1099-DIV)
- Refund or state/local income taxes? (1099-G Form)
- Alimony income?
- Income (or loss) from the sale of stocks, Bonds or Real Estate? (including your home) (Forms 1099-S,1099-B)
- Disability income? (such as payments from insurance, or workers compensation) (Forms 1099-R, W-2)
- Distribution from Pensions, Annuities, and/or IRA? (Form 1099-R)
- Unemployment compensation? (Form 1099-G)
- Social Security or Railroad Retirement Benefits? (Forms SSA-1099, RRB-1099)
- Income (or loss) from Rental Property?
- Other income? (Gambling, lottery, prizes, awards, jury duty, Sch K-1, etc.) (Forms W-2G) Specify

EXPENSES

Last Year, Did You (or Your Spouse) Pay:

- Alimony? If yes, do you have the recipient's SSN?
- Home mortgage interest? (Form 1098)
- Real estate taxes for your home or personal property taxes for your vehicle? (Form 1098)
- Charitable contributions?
- For supplies used as an eligible educator such as a teacher, teacher's aide, counselor, etc.?
- Expenses related to self-employment income or any other income you received?

LIFE EVENTS

Last Year, Did You (or Your Spouse):

- (COD) Have debt from a mortgage or credit card cancelled/forgiven by a commercial lender? (Forms 1099-C, 1099-A)
- Buy, sell or have a foreclosure (COD) of your home? (Form 1099-A)
- Have Earned Income Credit (EIC) disallowed in a prior year?
- Purchase and install energy-efficient home items?
- Pay any student loan interest? (Form 1098-E)
- Make estimated tax payments or apply last year's refund to this year's tax?

SELF-EMPLOYED BUSINESS- SUMMARY OF INCOME/EXPENSES (SCHEDULE C)

Name of Business:	Type of Business:	Phone Number:
Gross Income/1099 Misc.: \$	Gross Expense: \$	Net Income: \$

CHILD OR DEPENDENT CARE EXPENSES

Provider's Name:	Amount Paid: \$
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SIGNATURES

By my signature herein below, I state under penalty of perjury that the information I have provides TaxDrz, LLC is true and correct. If I did not supply a copy of receipt/proof of expenses, if required by the IRS, I can provide through contacting the institution. I am providing this information for the purpose of filing my tax return to claim Lifetime Learning/Hope Credit and/or Education deduction.

Signature of Taxpayer: _____ Date: _____

Signature of spouse (only if for a joint membership): _____ Date: _____