



TAX CLIENT INTERVIEW FORM

TAX YEAR _____

Can another taxpayer claim you as a dependent on their return? If yes, did they? _____

Are you a qualifying child for EIC of another person? _____

Was your home in the United States for more than half of 2014? _____

Did your marital status change in 2014? _____

State of Residence _____ Did you live there the entire year? _____

If no, list other state or states you resided in with dates _____

Did you pay alimony or spousal support? \$ _____ Person paid _____ SS# _____

Did you receive alimony? _____ Amount \$ _____

Do you have childcare expenses? _____ **Provide statement from the child care provider**

For whom? _____

Provider's Name _____ Address _____

Phone number _____ EIN or SS# _____

Amount Paid? _____ Do you have a flex plan? _____

Do you pay student loan interest? _____ **provide statement**

Did you, your spouse, or dependent attend and pay for College? _____ **provide 1098-T & paid invoice from school**

Do you contribute to a Retirement Plan? IRA? Roth? _____

Do you make federal or state estimated payments? _____

Did you receive a 1099K? _____ (ex. Do you sell items and get paid with a credit card or PayPal – eBay? Craft shows? Flea markets? Small Business?)

Do you have a foreign bank account valued at over \$10,000? _____

Did you transfer or was a home transferred from parent to child? _____

Did you or your spouse become disabled or legally blind during the tax year? _____

Did you receive combat pay? _____

Were you notified by the IRS or State of any changes in a prior year's tax return? _____ **Bring in notice**

Do any of your dependents have income over \$1900 from interest or dividends? _____

Was your mortgage or credit card forgiven in foreclosure or restructure? (Bankruptcy) _____