2014 Intake/Interview Sheet

Section A. You should complete Pages 1-3

Thank you for allowing us to prepare your tax return. You are responsible for the information on your return so please provide complete and accurate information to the interviewer. If you have any questions please ask the preparer when she contacts you.

You will need your:

- Tax information such as Forms W-2, 1099, 1098
- Social security cards or ITIN letters for you and all persons on your tax return.
- Proof of Identity (such as a valid driver's license or other government issued ID).

I hese items must be copied and will be kept private and confidential.								
Part I. Your Personal Information								
Your First Name		M. I.	Last Name		Are you	ı a U, S. Citizen?		
						Yes	No	
2. Spouse's First Na	. Spouse's First Name M. I. Last Name] :	Is spouse a U. S. Citizen?				
						YesNo		
3. Mailing Address		Apt#	City	State	e Z	Zip Code		
4. Contact Information	on							
Phone:		Cell Phone:		Email:				
5. Your Date of Birth	6.	Your Job Title	7. Last yea	ar, were you: (a) I	Full time student	YesNo		
			Totally and	PermanentlyY	esNo Disab	led Legally Blind	YesNo	
8. Spouse's Date of	Birth 9. Sp	ouse's Job Title	10 . Last ye	ear, was you spou	se: (a) Full time	studentYes	No	
			Totally and	PermanentlyY	esNo Disabl	led Legally Blind	YesNo	
11. Can anyone clai	m you as a de	pendent on their t	ax return?Y	esNo	_Unsure			
12. Have you or your spouse: a. Been a victim of identity theft?Yes No B. Adopted as a child?Yes No								
Part II. Marital Statu	us and House	hold Information	1					
1. As of December 3	31, 2013, last	year, were you?						
Single								
Married: Did you live with your spouse during any part of the last six months of 2013?Yes No								
Divorced or Legally Separated: Date of final decree or separate maintenance agreement:								
Widowed: Date of spouse's death:								
2. List names below of everyone who lived in your home in 2013 (other than you or spouse). Also list anyone who lived outside of your home that you supported during 2013. If additional space is needed please check here and list on page 3 under Additional								
questions or comme						1 0		
Name (first, last)	Date of	Relationship to	Number of	U. S. Citizen or	Marital Status	Full time	Received less	
Do not enter your	Birth	you (e.g.	months lived in	resident of US,	as of 12/31/13	Student in	than \$3700.00	
name or spouse		daughter, son,	your home in	Canada or	(S/M)	2013 (yes/no)	income in 2013	
name below.		mother, sister,	2013	Mexico (yes/no)			(yes/no)	
		none)						
Interview	vers assisti	ng with prepari	ng your return	are trained to p	provide high qu	uality service a	and uphold	

- the highest ethical standards.
- To report unethical behavior to HLA Tax Services, email us at marylatimore@gmail.com or call 205-595-
- To check the status of your refund visit "Where's My Refund?" on www.irs.gov or call 1-800-829-1954 for assistance.

Intake/Interview Sheet continued						
Section A. Please complete – check Yes, No or Unsure. Check appropriate box for each questions below. Please ask if you need help.						
Part III. Income – In 2013, did you (or your spouse) receive: Yes No Unsure						
	1. Wages or Salary? (Form W-2)					
	2. Tip Income?					
	3. Scholarships? (Forms W-2, 1098-T)					
	4. Interest/Dividends from: checking/savings accounts, bonds, CDs, brokerage? (Form1099-INT, 1099-DIV)					
	5. Refund of state/local income taxes? (Form 1099-G)					
	6. Alimony Income?					
	7. Self Employment income? (Form 1099 MISC, Cash)					
	8. Cash/check payments for any work performed not reported on Forms W-2 or 1099? 9. Income (or loss) from the sale of Stocks, Bonds or Real Estate? (Including your home) Forms 1099-					
	S, 1099-B)					
	10.Disability Income (such as payments from insurance or workers compensation)? (Forms 1099-R,					
	W-2)					
	11. Distributions from Pensions, Annuities, and/or IRA? (Form 1099-R)					
	12. Unemployment Compensation? (Form 1099-G) 13. Social Security or Railroad Retirement Benefits? (Forms SSA-1099, RRB-1099)					
	14. Income (or loss) from Rental Property?					
	15. Other Income: (gambling, lottery, prizes, awards, jury duty, Sch Ke-1,etc.) Specify: (Forms W-2 G)					
	Specify					
Part IV. Expenses	s – In 2013 Did you (or your spouse) pay:					
l	1. Alimony: If yes, do you have the recipient's SSN? YesNo					
	2. Contributions to a retirement account?IRARoth IRA401K Other					
	3. Post-secondary educational expenses paid for yourself, spouse or dependents? (Form 1098-T)4. Unreimbursed employee business expenses (such as uniforms or mileage)?					
	6. Home mortgage interest? (Form 1098)					
	7. Real estate taxes for your home or personal property taxes for your vehicle? (Form 1098)					
	8. Charitable contributions?					
	9. Child/dependent care expenses, such as day-care? 10. For supplies used as an eligible educator such as teacher, teacher's aide, counselor, etc.?					
	11. Expenses related to self-employment income or any other income you received?					
	ts – In 2013 Did you (or your spouse):					
Yes No Unsure	1. Have a Health Savings Account? (Forms 5498-SA, 1099-SA, W-2 with code W in Box 12)					
	2. Have debt from a mortgage or credit card canceled/forgiven by a commercial lender? (Form 1099-C,					
	1099-A)					
	3. Buy, sell or have a foreclosure of your home? (Form 1099-A)					
	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.)?					
	7. Receive the First Time Homebuyers Credit in 2008?					
	8. Pay any student loan interest? (Form 1098-E)					
	9. Make estimated tax payments or apply last year's refund to this year's tax? If so how much?					
	10. File a 2010 federal tax return containing a "capital loss carryover" on Form 1040 Schedule D?					
Presidential Election Campaign Fund: (If you check a box, your tax or refund will not change.)						
Check he	ere if you, or your spouse if filing jointly, want \$3 to go to this fundYou Spouse					

Part VI Additional Information and Question	
<u> </u>	ehold considered disabled? YesNo
If you are due a refund would you like: Paper check mailed to your mailing Direct Deposit Refund Transfer Yes	g addressYesNo No (Please provide a voided check) No (Please provide a voided check)
 Ask your preparer about purchasing Increfund. IRAs are a safe and secure way 	dividual Retirement Account (IRA) with part or all of your tax y to invest in the future.
If you are due a refund, would you like information or	n how to split your refund between accounts?Yes No
If you have a balance due, would you like to make a	payment directly from your bank account?Yes No
Would you like information about securing affordable	e life insurance for you, your dependents or grands?Yes No
Would you like information about college funding for	your dependents or grandchildren?Yes No
Would you like information about affordable retireme	ent options for you and your spouse?Yes No
Would you like assistance in applying for the affordal	ble health insurance?Yes No
Additional questions or comments:	
Taxpayer Signature:	Date:
Spouse Signature:	
•	
	STOP HERE!
	for completing this form. nterviewer for use in preparing your return.
Your Civil Rights are Protected: It is the Internal R service by helping them understand and meet thei fairness to all. Under no circumstances will the I grantees, contractors, and/or subcontractors. NO OI or be subject to discrimination because of race, coactivities funded by the Department of Treasury – I	Revenue Service's mission to provide America's taxpayers top qual ir tax responsibilities and by applying the tax law with integrity a Internal Revenue Service tolerate discrimination by its employed NE shall be excluded from participating in, be denied the benefits olor, sex, national origin, disability, reprisal, or age in programs nternal Revenue Service. Any person who believes that he/she helpolor, sex, national origin, disability, reprisal or age in programs

Paperwork Reduction Act Notice

Department of Treasury IRS, may submit a written complaint to: National Headquarters; Office of Equity, Diversity & Inclusion; Internal Revenue Service; Attn: Director, Civil Rights Division (External Civil Rights Team); 1111 Constitution

Ave., NW Room 2422; Washington, DC 20224.

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Section B. Fo	or Interviewer/Preparer Completion	Section C. Quality Reviewer Section		
	ou are the link between the taxpayer's information and a rn. Verify the taxpayer's information on pages 1, 2 & 3 is	Review the tax return with the taxpayer to promote accuracy.		
complete. All que "Unsure" respo	uestions must be discussed with the taxpayer and all nses should be changed to "Yes" or "No".	Taxpayer's Identity , address, and phone numbers were verified with photo ID.		
Must be comple Question 2	ted by Interviewer only if persons are listed in Part II	2. The Tax preparer is certified to prepare/review the return.		
Yes No	1. Can anyone else claim any of the persons listed in Part II, Question 2, as a dependent on their return? If yes, which ones:	All unsure boxes were discussed with the taxpayer and correctly marked yes or no and documented.		
		4. The information on pages 1 and 2 was correctly addressed transferred to the return.		
Yes No	2. Were any of the persons listed in Part II, Question 2, totally disabled? If yes, which ones:	5. Names, SSNs , ITINs , and EINs were correctly transferred to the return.		
and permanently	ulsableu: II yes, which ones.	6. Filing Status is correctly determined.		
		7. Personal and Dependency Exemptions are entered correctly on the return.		
Yes No	3.Did any of the persons listed in Part II, Question 2 provide more than 50% of their own support? If yes, which ones:	8. All income (including income with or without source documents) checked yes in part III was correctly transferred to the return.		
		9. Adjustments are correct.		
Yes No	4. Did the taxpayer pay provide more than half support for any for any persons in Part II, Question 2? If yes, which ones:	10. Standard, Additional or Itemized Deductions are correct.		
		11. All credits are correctly reported.		
Yes No	E Did the townsyar pay over helf the cost of maintaining a home	12. Withholding shown on Forms W-2, 1099 and Estimated Tax Payments are correctly reported.		
	5. Did the taxpayer pay over half the cost of maintaining a home for any of the persons in Part II, Question 2? If yes, which ones:	13. Direct Deposit/Debit and checking/saving account numbers are correct.		
		12. Withholding shown on Forms W-2, 1099 and Estimated Tax Payments are correctly reported.		
Reminders Use	Publication 17, Your Federal Income Tax in making tax law	14. Correct Site IDN listed on Interview Sheet and EFIN are shown on the return.		
determinations. Interviewer Signa	ature:	15. The taxpayer(s) was advised that they are responsible for the information on their return.		
Interviewer eigne	Additional Interviewer or Tax Prep			
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