

# Intake/Interview and Quality Review Sheet

**You will need:**

- Tax information such as Forms W-2, 1099, 1098, 1095.

- You are responsible for the information on your return. Provide complete and accurate information.

Your first name (*pronouns, optional*) M.I. Last name Your date of birth Your job title

Spouse's first name (*pronouns, optional*) M.I. Last name Spouse's date of birth Spouse's job title

Mailing address Apt # City State ZIP code

Your telephone number Spouse's telephone number Spouse's email address (*optional*) Did you live or work in two or more states in 2024  
 Yes  No

**Check if you or your spouse were in 2024:**

A U.S. citizen  You  Spouse  No  Spouse  No

In the U.S. on a visa  You  Spouse  No  Spouse  No

A full-time student  You  Spouse  No  Spouse  No

**If due a refund, how would you like your refund**

Direct deposit  Check by mail  Bank account  IRS.gov Direct Pay

Split refund between accounts  Other  Set up installment agreement  Mail payment to IRS

Would you like to receive written communications from the IRS in a language other than English  You  Spouse  No

What language \_\_\_\_\_  Yes  No

Would you like information on how to vote and/or how to register to vote \_\_\_\_\_  Yes  No

Would you, or your spouse if married filing jointly, like \$3 to go to the Presidential Election Campaign Fund \_\_\_\_\_  You  Spouse  No

As of December 31, 2024, what was your marital status

Never Married  Married  If married, were you married for all of 2024  Yes  No

Divorced  Legally Separated but not Divorced  Widowed

Date of final decree \_\_\_\_\_ Date of separate maintenance decree \_\_\_\_\_ Year of spouse's death \_\_\_\_\_

List the names below of everyone who lived with you last year (except your spouse) AND anyone you supported but did not live with you last year.

Name (first, last)	Date of birth (mm/dd/yy)	Relationship to you (child, parent, none, etc.)	Number of months lived in your home in 2024	Single or Married as of 12/31/2024 (S/M)	U.S. Citizen	Resident of U.S., Canada or Mexico	Full-time student	Totally and permanently disabled	Issued IPPIN

Answer Yes or No (Y/N)

**Expenses and Tax Related Events: Answer the questions**

**Paid any of the following expenses to itemize in 2024?**

- (A) Mortgage interest
- (A) Taxes: state, local, real estate, sales, etc.
- (A) Medical, dental, prescription expenses
- (A) Charitable contributions

**Paid any of these expenses in 2024?**

- (B) Student loan interest
- (B) Child and dependent care
- (B/A) Contributions to a retirement account
- (B) School supplies by a teacher, teacher's aide or other educator
- (B) Alimony payments (do not include child support)

**Did any of the following happen during 2024?**

- (B) You or someone in your family took educational classes (technical school, college, job related, etc.)

- (A) Sell a home
- (A) Have a health savings account (HSA)
- (A) Purchase health insurance through the Marketplace (Exchange)
- (A) Purchase and install energy-efficient home items (example: windows, furnace, insulation, etc.)
- (A) Have credit card, mortgage, or other debt cancelled/forgiven by a lender
- (A) Have a loss related to a declared Federal disaster area

- (B) Have a tax credit disallowed (example: earned income credit, child tax credit, or American opportunity credit)

Receive any letter or bill from the IRS

- (B) Make estimated tax payments or apply last year's refund to 2024 taxes

**Income: Answer the following questions**

**Received money from any of the following in 2024:**

- (B) Wages as a part-time or full-time employee  
How many jobs \_\_\_\_\_

(B/A) Tips

(B/A) Retirement account, pension or annuity proceeds

(B) Disability benefits (such as payments from insurance and worker's compensation)

(B) Social Security or Railroad Retirement Benefits

(B) Unemployment benefits

(B) Refund of state or local income tax

(B) Interest or dividends (bank account, bonds, etc.)

(A) Sale of stocks, bonds or real estate

Did you report a loss on last year's return  Yes  No

(B) Alimony

(A/M) Income from renting out your house or a room in your house

If yes, did you use the dwelling unit as a personal residence and rent it for fewer than 15 days  Yes  No

Income from renting personal property such as a vehicle

(B) Gambling winnings, including lottery

(A) Payments for contract or self-employment work

Did you report a loss on last year's return  Yes  No

- Any other money received during the year? (example: cash payments, jury duty, awards, digital assets, royalties, union strike benefits)

