FORT LEAVENWORTH TAX CENTER
TAX YEAR 2010 CLIENT QUESTIONNAIRE (version 01/12/2011)

PLEASE READ THE FOLLOWING BEFORE SIGNING THE PRIVACY ACT STATEMENT AND ANSWERING THE QUESTIONNAIRE.

1. Welcome! We are here to provide you timely, accurate, courteous, and **free** tax preparation services.

2. Tax Service Eligibility: The Fort Leavenworth Tax Center participates in the Military Volunteer Income Tax Assistance (M-VITA) program. M-VITA is co-sponsored by the IRS and the Department of Defense and provides free tax assistance and preparation to all eligible Legal Assistance beneficiaries. Eligible beneficiaries normally include active duty, activated Reserve Component (on active duty at time of service for more than 20 days), retired military (bluish green ID), divorced beneficiaries (salmon colored ID) and family members of each category (salmon colored ID). For more eligibility details, refer to AR 27-3, Chapter 2-5. We cannot provide tax services to "gray area" retired, reservists (red ID), nor prior Servicemembers on Transitional Assistance (TA). We welcome all ranks and income levels.

3. It is Your Return: Whether prepared by yourself, friends, commercially, or with free public assistance, the content of your tax return is ultimately your responsibility. Please view our services as tax assistance – not tax advice you might receive from a paid preparer. Review your return and sign only if you are confident in the accuracy of figures you have provided, and the tax positions you have taken on it.

4. Electronic Filing: To reduce administrative burdens and adhere to Federal and State electronic filing mandates, our policy is to electronically file all eligible federal and state returns. We appreciate your cooperation and understanding in this matter.

5. Military Spouses Residency Relief Act: Federal legislation passed in 2009 may impact the tax jurisdiction of income earned for services performed by military spouses. For certain spouses, income earned in a state where the military spouse is stationed with their servicemember spouse may be deemed to have been earned in the legal state of residency or domicile. Please be careful when listing your state of residency or domicile on this questionnaire, as that state will have tax jurisdiction over all income placed on your Federal return. Your state of domicile is generally your permanent home to which you intend to return to following military service. Legitimate domicile also requires physical presence in that location prior to establishing legal residency. Please ask your tax preparer for a domicile information handout and consult with a Legal Assistance attorney for advice on your particular residency concerns or questions.

DATA REQUIRED BY THE PRIVACY ACT OF 1974
PRIVACY ACT STATEMENT (5 USC 522a)

AUTHORITY: 10 USC 3013, AR 340-18-4.
PRINCIPAL PURPOSES: To assist in preparation of federal/state income tax returns.
ROUTINE USES: To provide the basic information necessary to prepare the client's federal/state income tax return.
DISCLOSURE: Voluntary disclosure. Nondisclosure precludes preparation and filing of the federal/state income tax return.

Date: ________ Printed Name: ______________________ Signature: ______________________________

Volunteers assisting with preparing your return are trained to provide high quality service and uphold the highest ethical standards. To report any concerns to the IRS on site operating issues please call toll free 1-877-330-1205 or email wi.voltax@irs.gov.

For tax assistance, you (and spouse) will need:

- Active duty, retired, and/or family member ID Card (activation orders for RC)
- Copies of all W2, 1098, and 1099 forms
- SSN or ITIN for all individuals to be listed on the return (copy of Social Security card preferred)
- Form 8332 or divorce decree releasing exemption (Form 8332 required for divorcees after 12/31/2008
- Prior year federal & state return if available
- Child care provider's identification number
- Voided check or myPay account information for Direct Deposit
- Amounts and dates of estimated tax payments made
- Amounts of other income, adjustments, and deductions
- Power of Attorney if spouse is not available
- This completed questionnaire

BIOGRAPHICAL & CONTACT INFORMATION

*Please write your name as it appears on your Social Security Card even if different from your Military ID. Your full name and SSN must match what is on your Social Security Card exactly or **your return will be rejected**.*

On **December 31, 2010** were you?

☐ Single

☐ Legally 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: ________________________

Can a parent or someone else claim you (or spouse) as a dependent on his or her tax return? ☐ Yes ☐ No

Other than English, what language is spoken in your home? ____________________________

Are you or a member of your household considered disabled? ☐ Yes ☐ No

Taxpayer			Spouse		
First:	MI:	Last:	First:	MI:	Last:
SSN:		Date of Birth:	SSN:		Date of Birth:
Occupation:			Occupation:		
US Citizen ☐	Legally Blind ☐	Total Permanent Disabled ☐	US Citizen ☐	Legally Blind ☐	Total Permanent Disabled ☐
Current Mailing Address:					Unit:
City:	State:	Zip:	State of Legal Residence: Taxpayer - Spouse -		

	Daytime phone	Evening phone	Cell phone	Email address
Taxpayer				
Spouse				

Note – effective for divorces after 12/31/2008, the IRS will no longer accept a divorce decree or court ordered separation as proof of eligibility of the non-custodial parent to claim a dependency exemption. Custodial parent is defined as the parent with whom the child lives with the longer period of time. Only Form 8332 or a statement of equivalent content will be accepted by the IRS.

FAMILY AND DEPENDENT INFORMATION – Do not include yourself or your spouse

List everyone who lived in your home and outside your home that you supported during 2010
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Full Name	Date of Birth	SSN	Relation-ship to you (e.g. son)	# of months lived in your home	US citizen, resident of US, Canada, or Mexico?	Married as of 12/31/10?	Full time student?	Received more than $3650 in income?
					Y / N	Y / N	Y / N	Y / N
					Y / N	Y / N	Y / N	Y / N
					Y / N	Y / N	Y / N	Y / N
					Y / N	Y / N	Y / N	Y / N
					Y / N	Y / N	Y / N	Y / N

Dependent Care Expenses

Did you or your spouse pay any childcare expenses that allowed you to work or look for work? If yes, list each child below.

Child's Name	Provider's Name & Address	SSN or Fed EIN #	*Amount*

Special "Life Event" questions - during 2010- did you (or your spouse if filing a joint return):

Yes No Unsure

☐ ☐ ☐ Have a Health Savings Account? (Forms 5498-SA, 1099SA)
☐ ☐ ☐ Have debt from a mortgage or credit card cancelled/forgiven by a commercial lender? (Form 1099-C)
☐ ☐ ☐ Buy a home? If yes, closing date _________________
☐ ☐ ☐ Have Earned Income Credit (EIC) disallowed in a prior year? If yes, for which tax year ___________
☐ ☐ ☐ Purchase and install energy efficient home items? (such as windows, furnace, insulation, etc.)
☐ ☐ ☐ Live in an area affected by a natural disaster? If yes, where? _____________?
☐ ☐ ☐ Receive the First Time Homebuyers Credit in previous years? If yes, closing date _____________
☐ ☐ ☐ Pay any student loan interest?
☐ ☐ ☐ Make estimated tax payments or apply last year's refund to your 2010 tax? If so, how much _________

Additional Information your tax preparer should know about:

Income

Please check all boxes that apply - put a question mark if unsure.

☐ Wages – W2	☐ DITY Move - W2	☐ Self Employment income
☐ Interest – 1099Int	☐ Dividends – 1099Div/1099OID	☐ Unemployment - 1099G
☐ Sale of Stock/Bonds – 1099B	☐ Cost basis of investment sale	☐ State refund – 1099G
☐ Pension or Annuity – 1099R	☐ Social Security – SSA 1099	☐ IRA distribution – 1099R
☐ Received Alimony $_________	☐ Rental Property	☐ Partnership or Trust – K-1
☐ Scholarships - 1098T or W2	☐ Gambling Winnings - W-2G	☐ Farm Income
☐ Disability Income (SSA, VA, Ins.)	☐ Tip Income	☐ Awards, Prizes, Jury Duty
☐ Sale of Real Estate - 1099S	☐ Royalties – 1099Misc	☐ Other: _______________

Did you itemize deductions in 2009 and also receive a State tax refund? ☐ Yes ☐ No

If yes, in 2009 did you itemize : ☐ State Income taxes ☐ General Sales taxes

Did any of your dependent children receive 1099INTs, 1099DIVs, 1099B and/or 1099MISCs (for Alaska Permanent Fund dividends) listing in total, over $950 in income? ☐ Yes ☐ No

If yes, please discuss with your preparer the option to reporting this income on your own return.

Adjustments and Deductions

Did you made any Contributions to an IRA in 2010? If so for whom and how much?

Roth IRA- Self $______________ Traditional IRA- Self $_______________

Roth IRA- Spouse$____________ Traditional IRA- Spouse $____________

Please check all boxes that apply - put a question mark if unsure

☐ Reservist Travel Expenses	☐ Educator Expenses	☐ Self Employment Tax
☐ Student Loan Interest – 1098E	☐ Tuition and Fees (1098T)	☐ Vehicle Sales Tax
☐ Pension, 401K, Keogh, KPERS	☐ Non-reimbursed Moving Exp.	☐ Loss due to flood/ fire/ theft
☐ Paid Alimony $_____________	☐ Medical Savings Account	☐ Personal Property Taxes
☐ Home Mortgage Interest (1098)	☐ Real Estate Taxes Paid	☐ Non-reimbursed Job Exp
☐ Charitable Contributions	☐ Medical Expenses	☐ Paid Foreign Income Taxes
☐ Home used for Business Purpose	☐ Child Adoption Expenses	☐ Prior Yr State Balance Due

Refunds and Balances Due

☐ Yes ☐ No If you are due a refund, would you like a direct deposit or split of your refund (up to three accounts)?
☐ Yes ☐ No If you are due a refund, would you like information on how to purchase US Savings Bonds?
☐ Yes ☐ No If you have a balance due, would you like information about your payment options (direct debit, money order, credit/debit card or payment plan)?

We recommend direct deposit for all Federal and State refunds as well as direct debit of balance due. Direct debits can be scheduled for any day between the date of filing and April 18. Federal refunds may be split between a maximum of three accounts. Please attach proof of account(s). ENSURE this information is correct.

DIRECT DEPOSIT INFO

ATTACH VOIDED CHECK OR "MYPAY" DIRECT DEPOSIT PRINTOUT

Routing # ___________________ Account # ____________________

CERTIFIED TAX PREPARER USE ONLY BELOW THIS LINE!

You are the link between the taxpayer's information and a correct tax return. Verify the taxpayer's information on pages 2, 3 & 4 is complete. Any question marked "unsure" or with a "question mark" must be discussed with the taxpayer.

☐ Yes ☐ No — 1. Can anyone claim any of the persons listed in the "Family" section as a dependent on their return? If yes, which ones: ☐ N/A

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☐ Yes ☐ No — 2. Were any of the persons listed in the "Family" section totally and permanently disabled? If yes, which ones: ☐ N/A

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☐ Yes ☐ No — 3. Did any of the persons listed in the "Family" section provide more than half of their own support? If yes, which ones: ☐ N/A

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☐ Yes ☐ No — 4. Did the taxpayer provide more than half the support for each of the persons I listed in the "Family" section? If no, which ones: ☐ N/A

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☐ Yes ☐ No — 5. Did the taxpayer pay over half the cost of maintaining a home for any of the persons listed in the "Family" section? If yes, which ones: ☐ N/A

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Tax Preparer Reminder – Use Publication 17, Your Federal Income Tax For Individuals, and Publication 4012, Volunteer Resource Guide (aka 'the spiral") in making tax law determinations.

Additional Tax Preparer Notes: