Form 13614-C (Rev. 10-2011)	Department of the Treasury – Internal Revenue Service Intake/Interview & Quality Review Sheet	OMB # 1545-1964

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 certified tax preparer. If you have any questions please ask your preparer.

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 drivers license or other government issued picture ID).

Part I. Your Personal Information												
Your First Name		M. I.	Last	Last Name Are you a U.S						Citizen?		
Douglas			Dav	Davis X Yes								
2. Spouse's First Name			Last	Name				Is spo	use a U.S	. Citizen?		
									Yes No			
Mailing Address		Apt#		City					Code			
123 Elm St				New Bru	ınswick		NJ	089	01			
4. Contact Information Phone: 862-555-1111	Cell Phor	ne:			E-mail:	dd@myma	il.com					
5. Your Date of Birth	6. Your J	Your Job Title			Are you: 7. Legally Blind ☐ Yes ☒ No							
08/09/1991	Entreprer	neur			8. Totally	and Perman	ently [Disable	d 🗌 Yes	s ⊠ No		
9. Spouse's Date of Birth	10. Spous	e's Jo	b Title		Is Spouse: 11. Legally Blind Yes No							
					12. Totally and Permanently Disabled Yes No							
13. Can anyone claim you or yo	ur spouse	on the	ir tax re	eturn? [Yes 🗌	No 🗵 Unsu	re					
Part II. Marital Status and	l Househ	old lı	nform	nation								
1. As of December 31, 2011, were you? Single Married: Did you live with your spouse during any part of the last six months of 2011? Yes No Divorced or Legally Separated: Date of final decree or separate maintenance agreement: Widowed: Year of spouse's death:												
2. List names below of everyone who lived in your home in 2011 (other than you or spouse). Also list anyone who lived outside of your home that you supported during 2011. If additional space is needed please check here and list on page 3.												
Name (first, last) Do not enter your name or spouse's name below.	Date of (mm/do		(e.g. d son,	ship to you laughter, mother, r, none)	Number of months lived in your home in 2011	US Citizen o resident of th US, Canada o Mexico in 201 (yes/no)	e S or 8 1 12	Marital Status as of 2/31/11 (S/M)	Full- time student in 2011 (yes/no)	Received less than \$3700 income in 2011 (yes/no)		
(a)	(b)			(c)	(d) (e)			(f)	(g)	(h) '		
		$\overline{}$										
		-										

- Volunteers assisting with preparing your return are trained to provide high quality service and uphold the highest ethical standards.
- To report unethical behavior to IRS, email us at wi.voltax@irs.gov or call toll free 1-877-330-1205.

To check the status of your REFUND visit "Where's My Refund?" on www.irs.gov or call 1-800-829-1954 for assistance.

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Section A. Please complete – check Yes, No or Unsure to all questions below. Please ask if you need help.							
Part III. Income – In 2011, did you (or your spouse) receive:							
Yes No Unsure							
×			Wages or Salary? (Form W-2)				
Ц	X		Tip Income?				
Ц	X		Scholarships? (Forms W-2, 1098-T)				
	X	4.	Interest/Dividends from: checking/savings accounts, bonds, CDs, brokerage? (Forms 1099-INT,				
			1099-DIV)				
×	Ц		Refund of state/local income taxes? (Form 1099-G)				
	×		Alimony Income?				
×			Self-Employment payments (such as cash received for services, small business)? (Form 1099-MISC)				
	X	<u></u> 8.	Income (or loss) from the sale of Stocks, Bonds or Real Estate (including your home)?				
			(Forms 1099-S, 1099-B)				
	X	_	Disability Income (such as payments from insurance or workers compensation)? (Forms 1099-R, W-2)				
\vdash	X		Distributions from Pensions, Annuities, and/or IRA? (Form 1099-R)				
	×	_	Unemployment Compensation? (Form 1099-G)				
\sqcup	×		Social Security or Railroad Retirement Benefits? (Forms SSA-1099, RRB-1099)				
	×	=	Income (or loss) from Rental Property?				
×	Ш	14.	Other Income: (gambling, lottery, prizes, awards, jury duty, etc.) Specify: <u>Jury duty</u>				
			(Forms W-2 G, 1099-MISC)				
Par	t IV	. Expen	ses – In 2011 Did you (or your spouse) pay:				
Yes	No	<u>Unsure</u>					
	X	1.	Alimony: If yes, do you have the recipient's SSN? Yes No				
	X	2.	Contributions to a retirement account? IRA Roth IRA 401K Other				
×		3.	Educational expenses paid for yourself, spouse or dependents, such as tuitions, books, fees, etc.?				
			(Form 1098-T)				
	X	4.	Unreimbursed employee business expenses (such as teacher supplies, uniforms or mileage)?				
×		<u> </u>	Medical expenses (including health insurance premiums)?				
	X	6.	Home mortgage interest? (Form 1098)				
	X	7 .	Real estate taxes for your home or personal property taxes for your vehicle? (Form 1098)				
×		8.	Charitable contributions?				
	X	9.	Child/dependent care expenses, such as day-care?				
Par	t V.	Life Ev	ents – In 2011 Did you (or your spouse):				
Yes	No	Unsure					
$\overline{\Box}$	X		Have a Health Savings Account? (Forms 5498-SA, 1099-A, W-2 with code W in Box 12)				
П	X		Have debt from a mortgage or credit card canceled/forgiven by a commercial lender? (Form 1099-C)				
Ħ	X		Buy, sell or have a foreclosure of your home? (Form 1099-A)				
П	X		Have Earned Income Credit (EIC) disallowed in a prior year? If yes, for which tax year?				
Ħ	X		Purchase and install energy efficient home items (such as windows, furnace, insulation, etc.)?				
П	X		Live in an area that was affected by a natural disaster? If yes, where?				
П	X	_	Receive the First Time Homebuyers Credit in 2008?				
$\overline{\Box}$	X		Pay any student loan interest? (Form 1098-E)				
$\bar{\Box}$	X	_	Make estimated tax payments or apply last year's refund to your 2011 tax? If so how much?				
_	_	_					
X	П	10.	Attend school as a full time student? (Form 1098-T)				
	X		Adopt a child?				
	X		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.)							
			or your spouse if filing jointly, want \$3 to go to this fund 🗵 You 🗌 Spouse				
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Additional Information and Questions related to the preparation of your return								
Many free tax preparation sites operate by receiving grant money. The data from the following questions may be used by this site to apply for these grants. Your answers will be used only for statistical purposes.								
Other than English what language is spoken in the home? None								
Are you or a member of your household considered disabled? Yes No								
If you are due a refund or have a balance due:								
 Ask your preparer about Direct Deposit. It is the fastest, easiest way to receive your tax refund. An e-filed return means a fast refund. Taxpayers who combine e-file and Direct Deposit can get their refunds in as few as 10 days. 								
 Ask your preparer about purchasing Series I U.S. Savings Bonds with part or all of your tax refund are a safe and secure way to invest in the future. Purchase I Bonds for yourself or others in multip earn interest for up to 30 years. 								
If you are due a refund, would you like a direct deposit?	Yes X No							
If you are due a refund, would you like information on how to purchase U.S. Savings Bonds?	Yes X No							
If you are due a refund, would you like information on how to split your refund between accounts?	Yes X No							
If you have a balance due, would you like to make a payment directly from your bank account?	Yes X No							
Additional comments:								
STOP HERE! Thank you for completing this form. Please give this form to the certified volunteer preparer for use in preparing your return.								
Your Civil Rights are Protected: It is the Internal Revenue Service's mission to provide America's taxpayers to by helping them understand and meet their tax responsibilities and by applying the tax law with integrity and fair Under no circumstances will the Internal Revenue Service tolerate discrimination by its employees, grantees, co subcontractors. NO ONE shall be excluded from participating in, be denied the benefits of, or be subject to discribe because of race, color, sex, national origin, disability, reprisal, or age in programs or activities funded by the Der Treasury – Internal Revenue Service. Any person who believes that he/she has been discriminated against on the color, sex, national origin, disability, reprisal or age in programs or activities receiving financial assistance (e.g. Linics, Tax Counseling for the Elderly) from the Department of Treasury IRS, may submit a written complaint to Headquarters;Office of Equity, Diversity & Inclusion; Internal Revenue Service; Attn: Director, Civil Rights Division Rights Team); 1111 Constitution Ave., NW Room 2422; Washington, DC 20224.	ness to all. ontractors, and/or rimination partment of he basis of race, Low-Income Tax o: National							

Paperwork Reduction Act Notice

The Paperwork Reduction Act requires that the IRS display an OMB control number on all public information requests. The OMB Control Number for this study is 1545-1964. Also, if you have any comments regarding the time estimates associated with this study or suggestion on making this process simpler, please write to the Internal Revenue Service, Tax Products Coordinating Committee, SE:W:CAR:MP:T:T:SP, 1111 Constitution Ave. NW, Washington, DC 20224.

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Interview Notes:

- 1. Doug's parents are getting their return prepared at the same time by another preparer who tells you that they would get no benefit from claiming Doug as a dependent; therefore, they are not claiming him on their return.
- 2. Doug is a full-time junior in the marketing program at Rutgers University. His parents provided more than half of his support for the year.
- 3. Doug received a \$13 income tax refund in 2011 for his 2010 NJ income taxes. He did not bring any prior year tax information and does not know if he itemized deductions on his 2010 federal return.
- 4. Doug has always been an avid photographer. This year he started charging for his services and earned \$4,000 (all paid via cash or checks) providing photographic services for weddings and for various local businesses. His expenses associated with this service were:

a.	New camera	\$700
b.	New lenses	\$500
C.	Photo paper and blank DVDs	\$200

- 5. Doug bought a used car (\$10,700 including NJ sales tax) in May which he also uses for his photographic service. He has written records showing 1,000 business miles (800 during June plus 200 during July and August). He also shows 12,000 non-business miles. His car was used for this business starting on June 1st, 2011. He has no other car available and the car is available for personal use.
- 6. Doug received \$15 for service on a jury in 2011.
- 7. Doug decided to have some major dental work done which was not covered by insurance the total bill for this was \$4,000.
- 8. Doug contributed \$2,600 to his church according to the printed record from the church.
- 9. Doug put in 100 hours and drove 1,000 miles working for a local volunteer tax assistance program. He was not paid or reimbursed for his time or mileage.
- 10. Doug does want to contribute to the NJ Gubernatorial Election fund.
- 11. When asked about NJ Use Tax, Doug said he purchased the camera and lenses he used for photographic work online, but was not charged sales tax. He also bought \$487 of other items online for which he was not charged sales tax.
- 12. Doug's share of the rent on the apartment he shares with 3 other students was \$400 per month (paid by his parents).
- 13. Any payment or refund for NJ will be by check.

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Documents:



	a Employee's social security number 731-xx-yyyy	OMB No. 1545		Safe, accurate FAST! Use	RSP	≁ file		e IRS website at s.gov/efile	
b Employer identification number (EIN) 73-9xxyyyy				10,00		2 Federal income tax withheld 1,000.00			
c Employer's name, address, and Dale's Camero		3 Social security wages 4 Social security tax with 420							
123 Main St New Brunswick, NJ 08901				10,00 ial security tips	0.00	6 Medicare tax withheld 145.00 8 Allocated tips			
d Control number		9 Adv	rance EIC payn	nent	10 Dependent care benefits				
e Employee's first name and initial Last name Douglas Davis 123 Elm St New Brunswick, NJ 08901				nqualified plans		12a See instructions for box 12			
f Employee's address and ZIP code				NJSDI 50.00 NJSUI 42.50 NJFLI 6.00		12d			
15 State Employer's state ID num NJ 73 – 9xxyyyy		17 State incom		18 Local wage	s, tips, etc.	19 Local in	come tax	20 Locality name	
Form W-2 Wage and Tax Statement Department of the Treasury—Internal Revenue Service									

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