USA SETAF TAX CENTER INTAKE SHEET

Privacy Act Statement: AUTHORITY: 10 USC § 3013. PRINCIPAL PURPOSE: To assist USASETAF Tax Center personnel in the preparation and filing of federal and/or state tax returns. ROUTINE USES: To provide Tax Center personnel with sufficient information to advise on and prepare tax returns. MANDATORY OR VOLUNTARY DISCLOSURE AND EFFECT ON INDIVIDUAL BY NOT PROVIDING INFORMATION: Disclosure is voluntary. Nondisclosure prohibits tax assistance. By requesting income tax return services you authorize Tax Center personnel to retain a copy of this form or other electronic return information as required by the U.S. Internal Revenue Service. You will not be denied tax preparation services if you do not authorize retention of your tax information. U.S. Army tax preparers and lawyers are not permitted to give you financial advice or prepare or file a tax return with information they know is incorrect or inconsistent with tax law, and your submission of information does not create an attorney client relationship with Tax Center personnel. Tax preparation and filing services are free and you owe nothing for these services, however our tax preparation software automatically prepares an invoice showing you the fair market value of our tax preparation services.

Taxpayer's Full Name: _____ SSN: ☐☐☐ ☐☐ ☐☐☐☐

(as shown on your Social Security or Taxpayer Identification Card)

Date of Birth: ☐☐ ☐☐ ☐☐ (MM DD YY)

Your occupation: ☐ Soldier ☐ Other (DESCRIBE): _____
Your occupation is what you do, not your status. Do not write "civilian" or "contractor."

On December 31, 2012, you were: ☐ Single or Legally Divorced ☐ Legally Married ☐ Separated

If married filing Separate, did you live with your spouse at anytime after June 30, 2012? ☐ Yes ☐ No

Spouse Full Name: _____ SSN: ☐☐☐ ☐☐ ☐☐☐☐

(as shown on his/her Social Security or Taxpayer Identification Card)

Date of Birth: ☐☐ ☐☐ ☐☐ (MM DD YY)

Spouse occupation ☐ Soldier ☐ Other (DESCRIBE): _____
Your spouse's occupation is what s/he does, not his/her status. Do not write "civilian" or "contractor."

Mailing address: CMR 427 Box _____, APO AE 09630 Other: _____

Contact Telephone Number(s) Work: _____ Other: _____

E-mail address where we can contact you: Official: _____ Secondary: _____

Sponsor Grade: ☐ E1 ☐ E4 ☐ E7 ☐ W1 ☐ W4 ☐ O1 ☐ O4 ☐ O7 ☐ RET
☐ E2 ☐ E5 ☐ E8 ☐ W2 ☐ W5 ☐ O2 ☐ O5 ☐ O8 ☐ CIV
☐ E3 ☐ E6 ☐ E9 ☐ W3 ☐ O3 ☐ O6

Sponsor Branch: ☐ Army Soldier ☐ NAF ☐ DODDS ☐ Army Civilian ☐ AAFES ☐ Other: _____

Filing Status: (standard deduction)
☐ Single ($5,800) ☐ Married Filing Separate ($5,800) ☐ Qualifying Widow/Widower ($11,600)
☐ Married Filing Joint ($11,600) ☐ Head of Household ($8,500) ☐ Can be Claimed by Someone Else (Varies)

List Dependents You Supported in 2012: **(DO NOT LIST YOUR SPOUSE HERE)**

PROVIDE THE FIRST AND LAST NAME OF YOUR DEPENDENT(S) AS SHOWN ON THEIR SOCIAL SECURITY CARD OR TAXPAYER IDENTIFICATION CARD (if you have more than four dependents, provide this information on an additional intake sheet)	DATE OF BIRTH MM/DD/YY	DEPENDENT'S 9 DIGIT SOCIAL SECURITY NUMBER OR TAXPAYER IDENTIFICATION NUMBER	RELATIONSHIP TO YOU (IF OTHER, IDENTIFY THE RELATIONSHIP)	NUMBER OF MONTHS LIVED WITH YOU IN 2012	RECEIVED MORE THAN $950 OF UNEARNED INCOME IN 20101 (Y/N)	DID YOU PAY FOR CHILD CARE
1			☐ Daughter ☐ Son			
2			☐ Daughter ☐ Son			
3			☐ Daughter ☐ Son			
4			☐ Daughter ☐ Son			

Indicate if you are filing this return with:
☐ A power of attorney (we must retain a copy of the authorization)
☐ IRS Form 8332 (claiming a child who does not live with you as a dependent)
☐ Copy of divorce decree

DIRECT DEPOSIT INFORMATION

For direct deposit or payment of tax owed, identify your bank routing transit number, account number, and type.

ROUTING NUMBER: ☐☐☐☐☐☐☐☐☐

YOUR BANK ACCOUNT NUMBER: _____ ☐ CHECKING ☐ SAVINGS

(please verify your banking information)

The following are potential credits for you (or your spouse if filing a joint return) for 2012

First time homebuyer (payback) YES / NO

Live in an area that was affected by a natural disaster? If yes, where: _____

Did you itemize your 2012 taxes? YES / NO / UNSURE If yes did you receive a state refund YES / NO / UNSURE

What is your AGI for 2011 ? $ ☐☐☐☐☐☐

STATE TAX RETURN

Taxpayer: STATE _____ ☐ RESIDENT ☐ NON-RESIDENT ☐ PART YEAR RESIDENT

CITY: _____ COUNTY: _____ SCHOOL DISTRICT: _____

Spouse: STATE _____ ☐ RESIDENT ☐ NON-RESIDENT ☐ PART YEAR RESIDENT

CITY: COUNTY: SCHOOL DISTRICT:

Continued on Reverse