

TAX CENTER QUESTIONNAIRE

In order to provide you with the most efficient service, please answer all the questions provided below. This will ensure that we prepare the correct forms and that your tax return will be accurate. When completed, please save a copy of this file to your computer and send it to 48fw.jatax@lakenheath.af.mil. We will contact you to set up an appointment.

DID YOU KNOW?

You can complete and file your own taxes online. Contact the Tax Center for more information.

FULL NAME:

CONTACT NUMBER(s):

HOME STATE

EMAIL:

FILING STATUS: (Please tick)

Single

Married – Filing Jointly

Married – Filing Separately

Head of Household

CHECK YES OR NO

Yes No

1. Do you have children?
2. Do you own a home?
3. Have you paid any interest on a Mortgage in the last fiscal year? (*Itemize Schedule A*)
4. Have you earned any income from interest during the last fiscal year? (*1099-INT*)
5. Have you received any dividends during the last fiscal year? (*1099-DIV*)
6. Are you in receipt of any IRA or Retirement distributions? (*1099-R*)
7. Have you sold any shares/stock in the last fiscal year? (*1099-B*)
8. Have you paid any tuition in the last fiscal year? (*1098-T*)

CHECK YES OR NO

Yes No

9. Have you paid interest of student loans in the last fiscal year? (*1098-E*)
10. Have you received any unemployment compensation in the last fiscal year?
11. Have you received any social security benefits in the last fiscal year? (*SSA-1099-R*)
12. Have you paid any money on childcare in the last fiscal year?
13. Have you received any money in alimony in the last fiscal year?
14. Have you received any money as rent for a property in the last fiscal year?
15. Have you earned any income overseas in the last fiscal year?
16. Have you won money through gambling? (*W-2G*)

ANY OTHER INFORMATION: (Please provide any further information which may affect the preparation of your tax return including any other income that does not fall within the questions stated above.)

APPOINTMENT PREFERENCE:

	MON	TUE	WED	THU	FRI
0800-1000					
1000-1200					
1200-1400					
1400-1600					

ADDITIONAL APPOINTMENT INFORMATION (Please provide any information that you would like us to take into account when assigning an appointment.)

FOR OFFICE USE:

APPOINTMENT LENGTH

EARLIEST DATE TO SET APPOINTMENT