

INTERVIEW SHEET

Rev. 11/2012

Taxpayer Information

Social Security # _____ 1.Filing Status _____ Date of Birth (DOB) _____
 Single MFJ MFS HOH

Can you be claimed as a dependent on another person's tax return?

YES NO

First Name _____ Last Name _____ Occupation _____

Home Phone # _____ Work # _____ Cell Phone # _____ Carrier _____

Address _____

No Upfront Fees

Refund Check distributed quickly and safely at Fas Tax Direct Deposit - having fees deducted from refund check

Require Pre-Payment

Direct Deposit into your own checking or savings account Refund Check by Mail to address on 1040

Spouse Information ONLY IF filing a MFJ or MFS, or Qualifying Widower, complete the following:

Spouse's Name _____ Social Security # _____ Occupation _____

Spouse's Address _____ Date of Birth (DOB) _____ Date of Death _____

Income Information

YES NO W-2 forms from different employers # _____

YES NO You have deductions to itemize _____

YES NO Any 1099 Forms # _____

YES NO You paid college expenses for you or your dependent _____

YES NO You have self-employment to claim _____

YES NO You have Child Care Expense to claim _____

Support Verification

1. Marital Status Never Married Divorced Spouse Deceased Married but lived apart from spouse during the last 6 months of the year.

2. If you are divorced or legally separated, can you provide the IRS with any of the following documents?

Divorce Decree Separate maintenance agreement or separation agreement?

3. If you are married but did not reside with your spouse for the last 6 months of the tax year, can you provide the IRS with supporting documents verifying that your spouse did not live with you? Acceptable documents include:

Lease Agreement Utility Bills Letter from a clergy member Letter from social services

4. List all income sources that were not reported on any tax return received by you or any member of your household. Examples include Social security Benefits, SSI, TANF, HUD WIC, SNAP, Veteran's Benefits, Worker's Compensation, Child Support, Alimony, Cash Contributions and all money received by other household members.

Type of Payment	Gross Amount of Payment	How Often Received
	\$	
	\$	
	\$	
	\$	

5. Can you provide the IRS with receipts and bills in your name substantiating that you paid more than half the cost of maintaining the home? Check ALL that apply to you. Documentation that the IRS requires for proof includes:

Utility Bills Insurance Statements Grocery Receipts Maintenance and Repair Bills Lease Agreement
 Statements from any government agency verifying the amount and type of benefits received

6. Does any other person living with you in your home earn an income? YES NO If YES, list who they are and how much they earn a year on the next page.

Signature of taxpayer _____

Signature of Preparer _____

Date _____

Dependent Information. Complete a separate form for each dependent.

First Name	Last Name	Social Security #	Date of Birth	Relationship	# of months lived with taxpayer	Age of Child

If your W-2 form(s) or your valid Driver's License, and this 1040 application have different addresses, explain why.

Can you prove that this dependent lived with you for more than six months? Check each official document you can provide to the IRS.

- School Records Medical Records Social service records Childcare Provider Records

Can you provide documents that prove you supported this dependent more than six months during 2012? YES NO

Did you claim this dependent on your 2011 Tax Return? YES NO If No, explain _____

Complete if this portion only if the dependent did NOT live with his/her MOTHER	
What is the name of the child's Mother?	
For 2012, How many months, if any, did the child live with their mother?	
For 2012, Why did this dependent NOT live with his/her mother?	
For 2012, Where was the dependent's mother?	
Why did this dependent live with you?	
If the child has a different last name than yours, explain.	
Are you related to the dependent's mother?	<input type="checkbox"/> YES <input type="checkbox"/> NO If Yes, how are you related?
Do you have official birth certificates and marriage certificates to prove this relationship?	<input type="checkbox"/> YES <input type="checkbox"/> NO
Does the child visit their mother?	<input type="checkbox"/> YES <input type="checkbox"/> NO If Yes, how many days per year?
Does the mother pay for any support for this child?	<input type="checkbox"/> YES <input type="checkbox"/> NO If Yes, how much?
For 2012, Was your AGI higher than the child's mother?	<input type="checkbox"/> YES <input type="checkbox"/> NO
What is the annual income of the child's mother?	\$
Do you have custody of this dependent?	<input type="checkbox"/> YES <input type="checkbox"/> NO If No, why not?

Complete if this portion only if the dependent did NOT live with his/her FATHER	
What is the name of the child's father?	
For 2012, How many months, if any, did the child live with their father?	
For 2012, Why did this dependent NOT live with his/her father?	
Why DID this dependent live with you?	
For 2012, Where was the dependent's father?	
If the child has a different last name than yours, explain.	
Are you related to the dependent's father?	<input type="checkbox"/> YES <input type="checkbox"/> NO If Yes, how are you related?
Do you have official birth certificates and marriage certificates to prove this relationship?	<input type="checkbox"/> YES <input type="checkbox"/> NO
Does the child visit their father?	<input type="checkbox"/> YES <input type="checkbox"/> NO If Yes, how many days per year?
Does the father pay for any support for this child?	<input type="checkbox"/> YES <input type="checkbox"/> NO If Yes, how much?
For 2012, Was your AGI higher than the child's father?	<input type="checkbox"/> YES <input type="checkbox"/> NO
What is the annual income of the child's father?	\$
Do you have custody of this dependent?	<input type="checkbox"/> YES <input type="checkbox"/> NO If No, why not?

Signature of taxpayer

Signature of Preparer

Date