Form **13614** Rev. August 2006	Department of the Treasury – **Internal Revenue Service** **Intake and Interview Sheet**	**OMB # 1545-1964**

You (and Spouse) will need:

- *Proof of Identity*
- *Copies of ALL W-2, 1098, 1099 forms*
- *Social Security (SSN) or Individual Tax Identification Number (ITIN) for all individuals to be listed on the return*
- *Child care providers' identification number*
- *Taxpayers' banking information (voided check and/or savings deposit slip) for refund deposits*
- *Estimated tax payments made, etc.*
- *Amounts of other income*

Part I: Taxpayer Information

1. Your First Name	M.I.	Last Name	2. SSN or ITIN
3. Date of Birth (mm/dd/yyyy)	4. Job Title		
5. Spouse's First Name	M.I.	Last Name	6. SSN or ITIN
7. Date of Birth (mm/dd/yyyy)	8. Job Title		

9. Address	Apt #	City	State	Zip Code
10. Phone Numbers: Daytime	Evening	Cell		

11. Are you a U.S. Citizen? ☐ Yes ☐ No 12. Is your Spouse a U.S. Citizen? ☐ Yes ☐ No

13. Can your parents or someone else claim you or your spouse as a dependent on their tax return? ☐ Yes ☐ No

14. Did you pay more than half the cost of keeping up the home? ☐ Yes ☐ No

15. Check if Legally Blind: ☐ Taxpayer ☐ Spouse

16. Check if Permanently and Totally Disabled: ☐ Taxpayer ☐ Spouse

17. On December 31st 2006:
Were you: ☐ Single ☐ Legally Married ☐ Separated ☐ Divorced
a. If married, were you living apart from your spouse during the last 6 months of the year? ☐ Yes ☐ No

18. Was your spouse deceased? If yes, provide the date of death. _____ (mm/dd/yyyy)

Part II. Family and Dependent Information – Do not include you or your spouse.

Print the name of everyone who lived in your home and outside your home that you supported during the year.

Name (a)	Date of Birth mm/dd/yyyy (b)	Social Security Number or ITIN (c)	Relationship (son, daughter, etc.) (d)	Months person lived with you in 2006 (e)	US Citizen, Resident of US, Canada or Mexico? (f)	Is the dependent a full time student? (yes or no) (g)

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 suggestions 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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