Form 13614-C	m 13614-C Department of the Treasury – Internal Revenue Service				
(Rev. 10-2012)	Intake/Interview & Quality Review Sheet	OMB # 1545-1964			

Section A. Complete Pages 1-3

You are responsible for the information on your return so please provide complete and accurate information to the IRS certified volunteer 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.

Picture ID (such as a valid driver's license or other government issued ID for you and your spouse, if applicable).											
Part I. Your Personal Inform	nation										
Your First Name		M. I. Last Name						Are you a U.S. Citizen?			
Helen			Rosem	ont				X Yes No			
2. Your Spouse's First Name		M. I.	Last Na	me				Is your spouse a U.S. Citizen?			
								Yes No			
Mailing Address		Apt	#	City			Sta	te Zip	Code		
22 River Road				Medford			NJ	080	55		
4. Contact Information	Cell Phor				E-mail:						
Phone: 609-555-7890			le.			7 000	v Dli	ind		- W N-	
5. Your Date of Birth		Job Title Are you: 7. Legally list 8. Totally and Permanent				•	= =				
09/16/1968 9. Your Spouse's Date of Birth	Hair Styli		o'e Joh Ti	itlo			<u> </u>				
9. Your Spouse's Date of Birth	TO. TOULS	ppouse	5 30D II	ue		use: 11. Lega and Permanen					
13 Can anyone claim you or your	12. Totally and Permanently Disabled Yes No 13. Can anyone claim you or your spouse on their tax return? Yes X No Unsure										
					.5 <u>K</u> NO <u></u>	Offsure					
Part II. Marital Status and		1010	Intorn	lation							
1. As of December 31, 2012, were you? Single Married: Did you live with your spouse during any part of the last six months of 2012? Divorced or Legally Separated: Date of final decree or separate maintenance agreement: Widowed: Year of spouse's death:											
List names below of everyone your home that you supported on the support of the support o										tside of	
()		of Birth dd/yy)	(e.g. o son, mo	ship to you laughter, ther, sister, one) (c)	of months resident of US,		3,	Marital Status as of 12/31/12 (S/M) (f)	Full- time Student in 2012 (yes/no) (g)	Received less than \$3800 income in 2012 (yes/no) (h)	
To check the status of your REFUND visit "Where's My Refund?" on www.irs.gov or call 1-800-829-1954 for assistance.											
Volunteers assisting water	uph	old t	he hig	hest eth	ical stand	ards.	•				

Section A. Please complete – check Yes, No or Unsure to all questions below. Please ask if you need help.						
Part	III.	Income – In 2012, did you (or your spouse) receive:				
Yes	No	Unsure				
X		1. Wages or Salary? (Form W-2) If yes, how many jobs did you have in 2012?1				
X		2. Tip Income?				
	X	3. Scholarships? (Forms W-2, 1098-T)				
	X	4. Interest/Dividends from: checking/savings accounts, bonds, CDs, brokerage? (Forms 1099-INT, 1099-DIV)				
	X	5. Refund of state/local income taxes? (Form 1099-G)				
	×	6. Alimony Income?				
	X	7. Self-Employment Income? (Form 1099-MISC)				
	×	8. Cash/check payments for any work performed not reported on Forms W-2 or 1099?				
	X	9. Income (or loss) from the sale of Stocks, Bonds or Real Estate (including your home)? (Forms 1099-S, 1099-B)				
	X	10. Disability Income (such as payments from insurance, or workers compensation)? (Forms 1099-R, W-2)				
	X					
	_	11. Distributions from Pensions, Annuities, and/or IRA? (Form 1099-R)				
_ :		12. Unemployment Compensation? (Form 1099-G)				
	×	13. Social Security or Railroad Retirement Benefits? (Forms SSA-1099, RRB-1099)				
	X	14. Income (or loss) from Rental Property?				
[X	15. Other Income: (gambling, lottery, prizes, awards, jury duty, etc.)? (Forms W-2 G, 1099-MISC) Specify:				
Part	IV.	Expenses - In 2012 Did you (or your spouse) pay:				
Yes	No	Unsure				
\Box [X	1. Alimony: If yes, do you have the recipient's SSN? Yes No				
	X	2. Contributions to a retirement account?				
	X	3. Educational expenses for yourself, spouse or dependents, such as tuitions, books, fees, etc.? (Form 1098-T)				
	X	4. Unreimbursed employee business expenses (such as uniforms or mileage)?				
	X	5. 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)				
	X	8. Charitable contributions? 9. Child or dependent care expenses such as day-care?				
	X	10. For supplies used as an eligible educator such as a teacher, teacher's aide, counselor, etc.?				
	x					
		Life Events – In 2012 Did you (or your spouse):				
Yes □ □		Unsure 1. Have a Health Savings Account? (Forms 5498-SA, 1099-SA, W-2 with code W in Box 12)				
	X	Have debt from a mortgage or credit card canceled/forgiven by a commercial lender? (Forms 1099-C, 1099A)				
_ :	X	3. Buy, sell or have a foreclosure of your home? (Form 1099-A)				
	x	4. Have Earned Income Credit (EIC) disallowed in a prior year? If yes, for which tax year?				
	X	5. Purchase and install energy-efficient home items? (such as windows, furnace, insulation, etc.)				
	X	6. Live in an area that was affected by a natural disaster? If yes, where?				
	X	7. Receive the First Time Homebuyers Credit in 2008?				
	X	8. Pay any student loan interest? (Form 1098-E)				
	X	9. Make estimated tax payments or apply last year's refund to your 2012 tax? If so how much?				
	X	10. Attend school as a full time student? (Form 1098-T)				
	X	11. Adopt a child?				
	X	12. File a 2011 federal tax return containing a "capital loss carryover" on Form 1040 Schedule D?				
_ :	×	13. Become a victim of identity theft?				
	_	ial Election Campaign Fund: (If you check a box, your tax or refund will not change.)				
		e if you, or your spouse if filing jointly, want \$3 to go to this fund You Spouse				
		umber 52121E Form 13614-C (Rev. 10-2012)				
	_	1 OIII 100 17-0 (NOV. 10-2012)				

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 X No If you are due a refund or have a balance due: . Ask your preparer about Direct Deposit. It is the fastest, safest way to receive your tax refund. When you combine e-file and direct deposit, the IRS will likely issue your refund 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. Savings bonds are a safe and secure way to invest in the future. Purchase I Bonds for yourself or others in multiples of \$50 and 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: Under no circumstances will the Internal Revenue Service tolerate discriminatory treatment of taxpayers by its employees, or individuals who volunteer or work at Volunteer Income Tax Assistance (VITA) and Tax Counseling for the Elderly (TCE) sites. No taxpayer shall be subject to discrimination on the basis of sex, race, color, national origin, reprisal, disability or age in educational programs or activities supported by the Department of the Treasury - Internal Revenue Service. Taxpayers with a disability may require a reasonable accommodation in order to participate or receive the benefits of a program or activity supported by the Department of the Treasury – Internal Revenue Service. Site Coordinators and Managers are responsible for ensuring that requests for reasonable accommodation are granted when the request is made by a qualified individual with a disability. If a qualified taxpayer believes that he or she has been discriminated against based on sex, race, color, national origin, disability, reprisal or age, they can file a complaint with the Department of the Treasury - Internal Revenue Service. All written complaints should be sent to: Director, Civil Rights Division Internal Revenue Service 1111 Constitution Avenue, NW, Rm. 2413 Washington, DC 20224 For all inquiries concerning taxpayer civil rights, contact us at the address referenced above, or e-mail us at eeo.external.civil.rights@irs.gov. STOP HERE! Thank you for completing this form.

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

Catalog Number 52121E

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Interview Notes:

- 1. Helen would like to file as Single, but by consulting your preparer resources you determine that the only correct filing status for Helen is Married Filing Separately
- 2. Helen has not lived with her husband for several years.
- 3. Helen does not have her prior year return, but tells you that she did not itemize deductions last year.
- 4. Helen's husband's name is Peter Rosemont. His SSN is 682-xx-yyyy.
- 5. Peter did not itemize last year nor will he be itemizing this year.
- 6. Helen rents a home and pays \$875.00/month rent.
- 7. Helen's decision to contribute to the gubernatorial election campaign fund is the same as the presidential election campaign fund.
- 8. By consulting your preparer resources you determine that Medford is located in Burlington County NJ Code 0320
- 9. Helen had no out-of-state purchases on which she did not pay Use tax.

Documents:



	a Employee's social security number 681-xx-yyyy	OMB No. 1545		Safe, accurate, FAST! Use	rs e		e IRS website at s.gov/efile	
b Employer identification number (EIN)			ges, tips, other compe $26,482.00$		2 Federal income to 3,972.		
c Employer's name, address, and a Hair Do Salon	ZIP code			cial security wages 23,834.0 0)	4 Social security to 1,112.	24	
90 Main Street Medford, NJ 08055				dicare wages and tip 26,482.00		6 Medicare tax withheld 383.99		
·	7 Social security tips 2,648.00			8 Allocated tips				
d Control number			9			10 Dependent care		
Helen E. Rosem 22 River Road Medford, NJ 080	ont 55	Suff.	13 State emp	oler JSDI 52 JSUI 112	Third-party sick pay 2.96 2.55	12a See instructions 12b 12c 12c 12d 12d	for box 12	
f Employee's address and ZIP cod 15 State Employer's state ID num NJ 68-9xxyyyy/0	ber 16 State wages, tips, etc.	17 State incom 529.8		18 Local wages, tip	s, etc. 1	19 Local income tax	20 Locality name	
	d Tax nt bloyee's FEDERAL Tax Return. ed to the Internal Revenue Service.	2012		Depa	urtment of	the Treasury—Internal	Revenue Service	

	☐ CORRECTED (if	checked)					
PAYER'S name, street address, city, state, ZIP code, a	nd telephone no. 1 Unemploy	ment compensation C	OMB No. 1545-0120				
New Jersey Department of L PO Box 908 Trenton, NJ 08625	\$ State or I	156.00 ocal income tax credits, or offsets	2012	Certain Government Payments			
	\$		Form 1099-G				
	entification number 3 Box 2 amo	unt is for tax year 4	Federal income tax wit	hheld	Copy B		
22-2481818 681-xx	с-уууу	\$	315.60		For Recipient		
RECIPIENT'S name	5 ATAA/RTA	A payments 6	Taxable grants	This is important tax			
Helen E. Rosemont				information and is			
	\$	\$	\$	being furnished to the Internal Revenue			
Street address (including apt. no.)	7 Agricultur	e payments 8	If checked, box 2 is trade or business	Service. If you are required to file a return,			
22 River Road	\$		income	a negligence penalty or			
City, state, and ZIP code	9 Market g	ain			other sanction may be imposed on you if this		
Medford, NJ 08055	\$			income is taxable and			
Account number (see instructions)		10b State identification	ion no. 11 State income tax withheld		the IRS determines that it has not been		
	NJ		\$		reported.		
Form 1099-G (keep for your records) Department of the Treasury - Internal Revenue Service							