

PA Veterans Museum Law Clinic Tax Return Service Intake Questionnaire

Please print neatly. Mail, hand-deliver or fax (610-566-0789) this form and any other relevant documentation to the PA Veterans Museum by March 13th. **There will be a reception at the Museum on March 13th at -- p.m. You may attend to meet the lawyers and tax preparers who will provide this service.** The Museum is open Thursday – Sunday, from noon to 5:00 p.m. Our address is 12 East State Street, Media, PA 19063.

Your Information

First Name: _____ **M.I.:** _____ **Last Name:** _____

Address Line 1: _____

Address Line 2: _____

City: _____ **State:** _____ **Zip:** _____ **Home Phone:** _____

Cell Phone: _____ **E-mail:** _____

***Routing Transit Number for Electronically Deposited Refunds:** _____

***Account Number:** _____ ***Savings or Checking?** _____

*You may attach a bank statement or check marked "VOID" for the account if you don't know this info.

Dependents Information

Spouse's Full Name: _____ **Date of Birth:** _____

Social Security Number: _____

Full Name: _____ **Date of Birth:** _____

Social Security Number: _____ **Relationship:** _____

Full Name: _____ **Date of Birth:** _____

Social Security Number: _____ **Relationship:** _____

- List Name, DOB, and SSN for additional dependents on the back of this sheet.
- If any dependents passed away in 2009, list the date of death after date of birth.

Documentation

- Proof of Identification
- W-2 Forms (Yours and Your Dependents')
- 1099 Forms (Yours and Your Dependents')
- Last Year's Tax Return
- Mortgage Related Interest and Expenses
- Settlement Sheet HUD 1 for Purchase of a New Home
- Dealer Invoice for Purchases of New/Hybrid Car
- List of Non-Reimbursed Work Related Expenses
- Amount of Medical Insurance Premiums Paid
- List of Non-Reimbursed Volunteer Work Expenses
- Receipts for Medical Expenses
- Gifts to Charities or Non-Profits (Donations of \$250 or more require written acknowledgement from the recipients. Non-cash contribution of \$500 or more require Form 8283.)
- Bills for Home Energy Improvements (New hot water heater, new furnace, new roof, energy efficient windows, insulation, ect...)

Referred By: _____