

INTERVIEW QUESTIONNAIRE**Personal Information**

First Name	M.I.	Last Name	Phone #	Are you a US citizen?
Date of Birth	Job Title	Last year were you: Totally & permanently disabled?	Full-time Student? Legally blind?	
Email Address	Do you want to contribute \$3 to the Presidential Election Campaign Fund? This does not affect your refund amount.			

Spouse's Information

First Name	M.I.	Last Name	Phone #	Are you a US Citizen?
Date of Birth	Job Title	Last year were you: Totally & permanently disabled?	Full-time Student? Legally blind?	
Email Address	Do you want to contribute \$3 to the Presidential Election Campaign Fund? This does not affect your refund amount.			

Mailing Address

Street	Apt #	City	State	ZIP Code
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Can anyone claim you or your spouse as a dependent?

Have you, your spouse, or dependents been a victim of identity theft?

Do you have an Identity Protection PIN?

Marital & Household Status

As of December 31, 2020, what was your marital status?

Never Married?

Married?

Were you married in 2020?

Did you live with your spouse during any part of the last 6 months of 2020?

Divorced?

Date of final decree?

Legally Separated?

Date of separate maintenance decree?

Widowed?

Year of spouse's death?

Household Information

List names of: ~ Everyone who lived with you last year (not spouse) ~ Anyone you supported but did not live with you last year									To be completed by Preparer:				
First & Last Name	Date of Birth	Relationship to you	# of months in your home	US Citizen	Resident of US Canada or Mexico	Single or married	Full time student	Totally or permanently disabled	Q Child Relative of anybody else	Provide 50% + own support	Less than \$4,300	TP 50% + support	50% + maintaining home

Income

Yes	No	
<i>For each question, check yes or no:</i>		
		Wages or Salary (Form W-2)
		Tip Income
		Scholarships (Form W-2, Form 1098-T)
		Interest / Dividends from checking or savings accounts, bonds, CDs, or brokerage (Forms 1099-T, 1099-DIV)
		Refund of state / local income taxes (Form 1099-G)
		Alimony income or separate maintenance payments
		Self-Employment income (Forms 1099-MISC, 1099-NEC, cash, virtual currency, etc.)
		Cash / Check / Virtual Currency payments for any work performed not reported on W-2 or Form 1099
		Income (or loss) from the sale or exchange of Stocks, Bonds, Virtual Currency or Real Estate (Forms 1099-S, 1099-B)
		Disability Income from insurance or Workers comp (Forms 1099-R, W2)

Yes	No	Income (continued)
		Retirement income from Pensions, Annuities, and or IRA (Form 1099-R)
		Unemployment compensation (Form 1099-G)
		Social Security or Railroad Retirement Benefits (Forms SSA-1099, RRB-1099)
		Income (or loss) from Rental Property
		Other income: Gambling, Lottery, Prizes, Awards, Jury Duty, Virtual Currency, Sch K-1, Royalties, Foreign Income, etc.
Yes	No	Expenses
		Alimony or Separate Maintenance paymnts: If yes, Recipient's SSN:
		Contributions to a Retirement Account: IRA? 401K? Roth IRA? Other?
		College or post secondary educational expenses
		Medical & Dental Expenses (including insurance premiums)
		Taxes from State, Real Estate, Personal Property, or Sales
		Mortgage Interest
		Charitable Contributions
		Child / Dependent Care expenses
		Supplies used as an eligible educator such as a Teacher, Teacher's Aide, Counselor, etc.
		Expenses related to Self-Employment income or any other income you received
		Student Loan Inerest (Form 1098-E)
Yes	No	Miscellaneous Questions
		Have a Health Savings Account (HSA) (Form 5498-SA, 1099-SA)
		Have credit card or mortgage debt cancelled / forgiven by a lender or have home foreclosure (Forms 1099-C, 1099-A)
		Adopt a child
		Have Earned Income Credit, Chil Tax Credit, or American Opportunity Credit disallowed in a prior year: Which year?
		Purchase or Install energy-efficient home items (windows, furnace, or insulation)

Yes	No	Miscellaneous Questions (continued)	
		Receive First Time Home Buyers Credit in 2008	
		Make Estimated Tax Payments or apply last year's refund to this year's tax:	How much?
		Have Health Coverage through the Marketplace or Exchange (Form 1095-A)	
		Receive Economic Impact Payment (Stimulus) in 2020	
		Did you live in an area that was declared a Federal Disaster Area:	Where?
		Did you or your spouse if filing jointly, receive a letter from the IRS	

Privacy Policy:

This Privacy Policy describes policies and procedures on the collection, use and disclosure of your information with Michele's Virtual Solutions for tax preparation services.

The information on the Interview Questionnaire is used to communicate with you for the sole use of preparing and e-filing an accurate and complete Income Tax Return to the IRS satisfying their filing requirements. The Interview Questionnaire and Tax Documents that are sent to me will be kept in a safe and secure manner. The information you provide is completely voluntary; however if not complete, I will not be able to prepare and file your income tax return. At no time will I ever sell or give away any of your information.

This information is retained in a safe and secure manner only for as long as necessary to satisfy retention records if asked by the IRS or Republic Bank (if using our bank products) any questions or if an audit should occur. When no longer needed, records will be destroyed permanently in a safe and secure manner according to requirements for tax preparation businesses.

I have read the above Privacy Policy & Consent to Disclose my information to Michele's Virtual Solutions:

Signature

Print Name

Date

Spouse Signature

Print Name

Date