



Tax-Aid Questionnaire ENGLISH

Tax-Aid Use Only

Volunteer Screener Name: _____

Did you check client photo ID and SSN/ITIN? Y/N

Preparer Name/Laptop Number: _____

Reviewer Name: _____

Return Level (circle one): 1, 2 or 3

Site Manager circle one: Efile or Paper or No File
Filing Status: S | MFJ | HoH | QS

Client #: _____

Entered into the Tax-Aid client tracker? Y/N

Client instructions: Complete pages 1-12

Tax return year(s) you need prepared.
Circle all that apply.

2023, 2022, 2021, 2020, 2019, 2018, 2017.

For additional years, enter
here: _____

Preferred Language: _____

Part 1 – Your Information

Did you file your tax return last year?	Yes	No
Did Tax-Aid prepare your taxes last year?	Yes	No
Have you already filed a tax return this year?	Yes	No
Have you or your spouse received any letters from the IRS or State FTB?	Yes	No

Taxpayer's name

First _____ Middle _____ Last _____

Spouse's name

First _____ Middle _____ Last _____

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Personal Information	Taxpayer	Spouse
Social Security Number		
If you have an Individual Identification Number (ITIN), please list it		
Mobile Phone Number		
Email Address (PLEASE PRINT CLEARLY)		

Personal Information	Taxpayer	Spouse
Birth Date (Month/Day/Year)	__/__/____	__/__/____
Are you a U.S. citizen? <input type="checkbox"/> (Check the box if naturalized)	Yes / No	Yes / No
Are you a full-time student?	Yes / No	Yes / No
Are you claimed as a dependent on another person's tax return such as your parent?	Yes / No	Yes / No
Are you legally blind?	Yes / No	Yes / No
Last year were you permanently disabled?	Yes / No	Yes / No
Home Phone		
Home address, Apt./Unit		
City, State, Zip Code		

Employment Information	Taxpayer	Spouse
What is your job / job title?		
Employer name(s)		
How long have you worked there?		
How are you paid (monthly, weekly, cash)?		

Part 2 – How are you filing?

Single (including registered domestic partnerships, civil unions, or other formal relationships under state law)

Married filing separately ²

⇒ Date of final decree or separate maintenance agreement _____

Spouse First Name: _____ Middle _____ Last _____

Spouse: Social Security/ITIN number: _____

Married filing jointly

⇒ Was your marriage recognized under state law for the state(s) you are filing in? Yes / No

⇒ Were you married as of December 31 of last year. Yes / No

Head of Household

Did your spouse live with you during any part of the last six months of the tax year? Yes / No

Qualifying Surviving Spouse

Yes / No

Year of spouse's death _____

Do you have a dependent child or stepchild that you claim on your tax return Yes / No

If you/your spouse were a victim(s) of identity theft and received an e-filing IP PIN from the IRS, what is the IP PIN?

E-Filing IP PIN	Taxpayer	Spouse
IP PIN #		
Type of ID		
ID #:		
State ID issued		
Issue date		
Expiration date		

The fastest way to get your tax refund is via direct deposit to your bank account. If you want Direct Deposit for your tax refund, list your banking information.

Bank name _____

Routing number _____

Account number _____

Type of account: Checking Savings

Part 3 Dependents – If no dependents, skip to Part 4

Have you or your spouse adopted a child? Yes / No

Dependent's Full Name (First, Middle Initial, Last)	Date of Birth (mm/dd/yyyy)	US Citizen	Resident of US, Canada, or Mexico last year	Social Security Number	# months lived with payer	Full time student	Relationship (son, daughter, etc.)	Totally permanently disabled
		Yes / No	Yes / No			Yes / No		Yes / No
		Yes / No	Yes / No			Yes / No		Yes / No
		Yes / No	Yes / No			Yes / No		Yes / No
		Yes / No	Yes / No			Yes / No		Yes / No
		Yes / No	Yes / No			Yes / No		Yes / No

Part 4 - Last year, did you, your spouse, or all your dependents...

1. Did you, your spouse, and all of your dependents have health insurance for the entire tax year?	Yes / No
2. Receive one or more of these forms? (Check the box) <input type="checkbox"/> 1095-B <input type="checkbox"/> 1095-	Yes / No
3. Have coverage through the Marketplace (Exchange) or receive Form 1095-A and California Form 3895 ? <div style="margin-left: 40px;"> a. If yes, receive an advanced payment from the Marketplace to help pay your monthly premium? b. If yes, is everyone listed on your Form 1095-A being claimed on this tax return? </div>	Yes / No Yes / No Yes / No
4. Have an exemption granted by the Marketplace? Reason _____	Yes / No

Part 4A - Did You or Your Spouse Receive...?

<p>1. Wages (W-2) 1a. Circle the number W2s you have 1 - 5 6 or more²</p>	<p align="center">Yes / No</p>
<p>2. Did you work for In Home Support Services (IHSS)</p>	<p align="center">Yes / No</p>
<p>2a. If you answered yes to question 2, do you live in the same residence with the person you provide In Home Support Services to?</p>	<p align="center">Yes / No</p>
<p>3. Tips</p>	<p align="center">Yes / No</p>
<p>4. Scholarships² (1098-T)</p>	<p align="center">Yes / No</p>
<p>5. Interest/dividends² (1099-INT, 1099-DIV)</p>	<p align="center">Yes / No</p>
<p>6. State/local tax refund (1099-G)</p>	<p align="center">Yes / No</p>
<p>7. Alimony income or separate maintenance payments Date of decree _____</p>	<p align="center">Yes / No</p>
<p>8. Self-employment income (1099-MISC, 1099-NEC, Cash)</p>	<p align="center">Yes / No</p>
<p>9. Income for work not reported² on Forms W-2/1099</p>	<p align="center">Yes / No</p>
<p>10. Did you receive 1099-K in exchange for performing any services and goods?</p>	<p align="center">Yes / No</p>
<p>10a. Why did you receive 1099-K? _____</p>	
<p>11. Did you earn income outside California?</p>	<p align="center">Yes / No</p>

12. Transactions of stocks ² /bonds /real estate(1099-S, 1099-B)	Yes / No
13. Disability income ² (insurance/workers comp) (Forms 1099-R, W-2)	Yes / No
14. Pension ² , annuity, IRA distributions (1099-R)	Yes / No
15. Did you withdraw from your IRA ² or other retirement accounts?	Yes / No
15a. If you answered Yes to question 15, please circle the reason for withdrawal: COVID-19 Normal Distribution (RMD) or Rollover or Other (please write in: _____)	
16. Unemployment compensation (Form 1099-G)	Yes / No
17. Social Security, Railroad Retirement Board (SSA-1099, RRB-1099)	Yes / No
18. Income (or loss) from rental property ³	Yes / No
19. Other income ² (gambling/lottery W2-G, prizes/awards, jury duty, Schedule K-1, etc.)	Yes / No
20. Have you purchased and/or sold any cryptocurrency ³ (example bitcoin) (Check the box) <input type="checkbox"/> Sold cryptocurrency <input type="checkbox"/> Purchased cryptocurrency or any other digital assets (example Non Fungible Token)	Yes / No
21. Have you received or paid any cryptocurrency ³ (example bitcoin) in exchange for performing any services?	Yes / No
22. Are you between the ages of 18-24 years old? Were you a part of the Foster Youth Program?	Yes / No Yes/ No

Part 4B - Did You or Your Spouse Pay...?

1. Rent (you could qualify for the California Renter's Credit)	Yes / No
2. Was your home rental considered subsidized housing?	Yes / No
3. Alimony or separate maintenance payments Date of decree _____	Yes / No
4. Contributions to a retirement ² account	Yes / No
5. Post-secondary education ² expenses	Yes / No
6. Medical ² expenses	Yes / No
7. Home mortgage ³ interest (1098)	Yes / No
8. Student ² loan interest (Form 1098-E)	Yes / No
9. Real estate ² taxes or personal property taxes (1098)	Yes / No
10. Charitable contributions 10a. Amount of contributions \$ _____ 10b. How was this contribution made (circle all that apply) Cash/Check /Credit Card	Yes / No
11. Child or dependent care expenses ² such as daycare	Yes / No
12. For supplies as an educator (i.e., teacher, teacher's aide, counselor, etc.)	Yes / No
13. Expenses related to self-employment ² income or any other income you received. Please complete this expense sheet: https://tinyurl.com/4sujn3je	Yes / No
13a. Circle the number of expenses you had: 1 - 5, 6 - 9 ² , more than 10 ⁽³⁾	

Part 4C - Did you have...

1. Health ² Savings Account (5498-SA, 1099-SA, W2 with Code W in box 12)	Yes / No
2. Have debt cancelled ² /forgiven/credit card/mortgage(1099-C, 1099-A)	Yes / No
3. Buy, sell, foreclose (COD) your home ² (1099-A)	Yes / No
4. Has Earned Income Credit (EIC) or Child Tax Credit (CTC) disallowed a prior year ² ? Which year_____?	Yes / No
5. Purchased/installed energy-efficient home items ² (such as windows,etc.)	Yes / No
6. Live in an area that was affected by a natural disaster? 6a. If so where?_____	Yes / No
7. Estimated ² tax payments for 2023? How much did you pay 4/15 \$_____ How much did you pay 6/15 \$_____ How much did you pay 9/15 \$_____ How much did you pay 1/15 \$_____	Yes / No
8. A "capital loss carryover" (refer to prior year Form 1040 Schedule D) ³	Yes / No
9. Receive the First Time Homebuyers Credit in 2008? (interest free \$7500 loan)	Yes / No

Tax-Aid depends on grants and contributions to operate our free tax sites. The data from the following optional questions may be used to apply for these grants and for statistical purposes.

1. Ethnicity: check all that apply

- African American/Black
- Latinx
- Latina/Latino North American Central American
- Asian
- Native American
- Caucasian/White
- Native Hawaiian/Pacific Islander
- Other _____
- Prefer not to answer

2. What is your gender? (Check one that best describes your current gender identity)

- Female
- Male
- Transgender Female
- Transgender Male
- Gender Non-binary
- Other _____
- Prefer not to answer

3. Do you or any member of your household have a disability?	Yes / No Prefer not to answer
4. Are you or your spouse a Veteran from the U.S. Armed Forces?	Yes / No Prefer not to answer
<p>5. How did you hear about us?</p> <p>Tax-Aid did my return before</p> <p>Internet search</p> <p>Another nonprofit</p> <p>Family or friend</p> <p>Instagram</p> <p>Facebook</p> <p>Other (please write in) _____</p>	<p>Yes / No</p> <p>Yes / No</p> <p>Yes / No</p> <p>Yes / No</p> <p>Yes / No</p> <p>Yes / No</p>

Tax-Aid Use ONLY. Client please skip this page.

INCOME SUMMARY			
Taxable Income		Non-Taxable Income	
Wages (W-2/1099)		SSA/SSI	
Interest/Dividends		AFDC	
Schedule C		Gen. Asst	
IRA/401(k)/Pension		Other	
TOTAL INCOME			
Is the taxpayer below our \$64,000 gross income (taxable) requirement?		Yes / No	
Does the taxpayer NEED to file a return?		Yes / No	
Remember to indicate direct deposit info on both federal and state			
Withholding		Earned Income Credit	
Estimated Tax Payments		Renter's Credit	
Direct Deposit Verified		Client Renumbered?	
EFile?		Critical Diagnostics cleared?	
ERO PIN? Yes / No			

Taxpayer Agreement to Disclose

We **will not** share or use personal identifying information including your social security number, ITIN, date of birth, refunds, or personal financial information. We will only use your contact information to inform you of other services that may benefit you. We will use and keep your data combined with THOUSANDS of other taxpayers for the duration of the free tax preparation program to share results like this:

Tax-Aid 2023 Results
3,181 tax returns
\$1,615,106 million in total refunds

The following persons, groups, or organizations receive the combined data results:

- Free tax preparation program donors and volunteers
- Various media partners
- Elected officials and other program supporters
- General public

Consent to Disclose

Federal law requires this consent form be provided to you. Unless authorized by law, we cannot disclose, without your consent, your tax return information to third parties for purposes other than the preparation and filing of your tax return. If you consent to the disclosure of your tax return information, Federal law may not protect your tax return information from further use or distribution. You are not required to complete this form. If we obtain your signature on this form by conditioning our services on your consent, your consent will not be valid. If you agree to the disclosure of your tax return information, your consent is valid for the amount of time that you specify. If you do not specify the duration of your consent, your consent is valid for one year. If you believe your tax return information has been disclosed or used improperly in a manner unauthorized by law or without your permission, you may contact the Treasury Inspector General for Tax Administration (TIGTA) by telephone at 1-800-366-4484, or by email at complaints@tigta.treas.gov.

- Yes, I agree to share my tax return information with the above persons, groups or organizations
- No, I do not agree to share my tax return information with the above persons, groups, or organizations

Signature _____

Spouse's Signature _____

Date _____

Client: [Go to next page](#) →



TAX-AID

CLIENT PRIVACY NOTICE

FACTS	WHAT DOES TAX-AID DO WITH YOUR PERSONAL INFORMATION?
WHY?	U.S. federal law provides clients with the right to limit some but not all of a company's decisions with respect to the sharing of the client's personal information. U.S. federal law also requires us to tell you how we collect, share and protect your personal information. Please read this notice carefully to understand what we do.
WHAT?	We collect nonpublic personal information about you that is either provided by you or obtained by us with your authorization. The types of personal information we collect and share depend on the particular service that we provide to you. This information can include your: name; Social Security number; Individual Taxpayer Identification Number; address; date of birth; bank account information; employment details; earnings and expenses; family members' names, dates of birth, Social Security numbers and earnings (if any); and contact information (phone number and email address).
HOW?	Accounting service companies need to share their clients' personal information to run their everyday business. In the section below, we list the reasons accounting service companies can share their clients' personal information, the reasons Tax-Aid chooses to share some of this information and whether you can limit this sharing. Once you are no longer our client, we can continue to share your information as described in this notice.

Reasons we can share your personal information	Does Tax-Aid share?	Can you limit this sharing?
For our everyday business purposes— such as to process your tax filings, maintain your account(s), respond to court orders and legal investigations, or report to credit bureaus	Yes	No
For our marketing purposes— to offer our services to you	No	We don't share
For joint marketing with other companies	No	We don't share
For Nonaffiliates (defined below) to market to you	No	We don't share

QUESTIONS?	Call us at 415-229-9240 or email us at admin@tax-aid.org
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Who we are	
Who is providing this notice?	Tax-Aid
What we do	
How does Tax-Aid protect my personal information?	To protect your personal information from unauthorized access and use, we use security measures that comply with federal law. These measures include physical, electronic and procedural safeguards.
How does Tax-Aid collect my personal information?	We collect your personal information, for example, when you <ul style="list-style-type: none"> • submit your tax documents to us; • contact us with questions; and • work with one of our tax professionals to prepare your taxes.
Why can't I limit all sharing?	U.S. federal law gives you the right to limit only our sharing to Non Affiliates to market to you. State laws and individual companies may give you additional rights to limit sharing.
Definitions	
Nonaffiliates	Companies not related by common ownership or control. Such companies can be financial and nonfinancial companies.
Joint marketing	A formal agreement between non affiliated companies that together market products or services to you. Tax-Aid does not jointly market.
Other important information	
N/A	