

Determination for Eligibility of Income Tax Services

Taxpayer Last Name _____ First _____ SSN (Last four) _____

Taxpayers eligible for tax services are as follows (check box applicable to your military status):

Active Duty

Retired (20 or more years of active duty service or retired Reservist currently receiving retired pay)

Dependent Family Member (of Active Duty or Retired)

National Guard/Reservist (must be Title 10 status and provide copy of orders)

Surviving Family Member (of active duty, reserve component and retired members who would be eligible if the service or retired member were alive)

Tax services are provided pursuant to AR 27-3 and the IRS Volunteer Return Preparation Program which mandate preparation of simple returns. This list is not all encompassing; the Tax Center staff may limit services for items not listed here based on the level of complexity, length of preparation or other factors.

If you select yes to any of the following questions, you may not be eligible for our services. The Tax Center staff should review your documents prior to your completing the Client Agreement and Supplemental Questionnaire to IRS Form 13614-C Intake/Interview & Quality Review Sheet.

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| Yes | No | 1. Did you earn Self-Employment income (Form 1099-Misc) from contract labor, small business, hobby, etc.? (Tax Center staff will only prepare SCH C-EZ which does not allow for deduction of expenses.) |
| Yes | No | 2. Did you or your spouse convert a regular IRA to a ROTH IRA (Form 1099-R)? |
| Yes | No | 3. Do you have rental income/expenses or sell or dispose of rental property? |
| Yes | No | 4. Have you had prior year nondeductible IRA contributions? (Form 8606) |
| Yes | No | 5. Did you have a foreclosure or did the bank cancel any part of your mortgage loan? (Form 1099-A, Acquisition/Abandonment of Secured Property; Form 1099-C, Cancellation of Debt) |
| Yes | No | 6. Did you cash any U.S. EE or I Bonds to pay for postsecondary education for yourself, your spouse, or your dependents? |
| Yes | No | 7. Did your children receive more than \$950 from interest and dividends that you wish to claim on your own tax return instead of your child's return and the child's gross income is less than \$9,500? |
| Yes | No | 8. Did you earn dividends with foreign tax over \$300 (\$600 married filing jointly)? |
| Yes | No | 9. Did you receive a lump sum from an employer sponsored plan and the recipient and/or employee was born before 1936? (Form 1009-R) |
| Yes | No | 10. Did you sell any stocks or mutual funds? (Tax Center staff will not calculate cost basis. If the purchase date and price, sale date and price, and cost basis for each transaction is <u>not</u> included on your Form 1099B, you will need to contact your financial agency to get this information. Your return cannot be prepared without it.) |
| Yes | No | 11. Do you need to file more than one state income tax return? |
| Yes | No | 12. Did you receive any of the following forms?
Form 1099-Q - Coverdell/ESA withdrawals
Form 1099-S - Proceeds from Real Estate Transactions
Schedules K-1, partnership or S corporation, or estates or trust |