

Instructions: Please provide requested information below. If you do not completely understand a question or have confidence that your answer is accurate, please leave the question blank. We will assist you. Thank you.

As needed to ensure an accurate tax return, **provide as much of the following as appropriate and, in some cases, available for you and your spouse:**

- A) Last year's tax return
- B) Copies of ALL W-2, 1099 Forms and proof of other income received by you and your spouse
- C) Social Security Cards or Individual Tax Identification (ITIN) Cards or ITIN letters for you, your spouse and any others shown on the tax return
- D) Valid Picture I.D.

1. Taxpayers First Name	M.I.	Last Name		
2. Date of Birth mm/dd/yyyy / /	3. Taxpayer Occupation			
4. Spouse's First Name	M.I.	Last Name		
5. Date of Birth mm/dd/yyyy / /	6. Spouse Occupation			
7. Address	Apt#	City	ST	Zip code
8. Phone number: Daytime	Evening		Cell	

- 9. Mark box if you or your spouse wants \$3 to go to the presidential campaign() Taxpayer () Spouse
- 10. Mark box if your parents or someone else can claim you or your spouse as a dependent on their return () Yes () No
- 11. Mark box if you or your spouse is legally blind.....() Taxpayer () Spouse
- 12. Mark box if you or your spouse is permanently and totally disabled.....() Taxpayer () Spouse
- 13. On December 31st, 2007
 Were you: () Single () legally married () Separated () Divorced () Widowed
 If married, were you living with your spouse at anytime during the last 6 months of the year?() Yes () No
 If widowed, did your spouse die after December 31, 2004.....() Yes () No
- 14. Did either you or your spouse live or work at any time in 2007 outside the state listed as your residence? () Yes () No
- 15. Are you and your spouse US citizens or Resident Aliens..... () Yes () No

During the tax year did you, your spouse, or anyone in your household:

Check if yes	Receive:
	Wages or salary
	Disability income
	Tips
	Interest from checking, savings, bonds, CDs, etc. (including non-taxable interest)
	Dividends
	State tax refund
	Alimony
	Income from self employment
	Stock sales from this year or a stock loss left from last year
	Did you receive a Brokerage Statement
	Pension or money from an IRA or any other retirement type account
	Unemployment payments
	Social Security or Railroad Retirement payments
	Other income (sale of property, gambling, awards, prizes, Jury duty, AKPFD, etc.)

Check if yes	
	Pay alimony (if yes, you must provide the name and SSN of the recipient)
	Contribute to an IRA or other retirement account
	Pay student loan interest
	Pay state, local and/or property taxes
	Have Home mortgage payments
	Attend college or vocational school
	Pay for Child/Dependent care that allowed you to work
	Make estimated tax payments
	Pay medical or medical insurance
	Make charitable contributions
	Can anyone else claim your child or dependent for EIC?
	Has your EIC ever been disallowed?
	Use direct deposit for any refund
	Divide refund between bank accounts

16. Print the name of everyone who lived in your home and outside your home that you supported during the year. Do not include your spouse or yourself. If a Form 8332 or a divorce decree allows someone else to claim any individual listed below, please circle the name (if unsure whether this is the case, please share the circumstances with us so we can help).

Full Name – as it appears on the person's Social Security card	Date of birth mm/dd/yy	Relationship (son, daughter, grandson, etc.)	Months person lived with you In 2007	Was this person a US citizen, Resident of US, Canada or Mexico?	Was this person totally & permanently disabled?	Was this person a full time student?	Was this person supported by anyone other than the taxpayer(s) listed at the top of this page?	Did this person have Gross Income of \$3,400 or more?

17. Are any of the people listed above filing a joint return for 2007? () Yes () No

<p>AUTHORIZATION AND CERTIFICATION</p> <p>As explained in the privacy notice on your AARP Tax-Aide envelope, the information that you provide to the volunteers at this site is treated as confidential. In addition, reasonable steps will be taken to protect information from unauthorized use.</p> <p>If you ask us to file your return electronically, we need to keep your information temporarily so that we can electronically process your return, ensure acceptance by the IRS, and forward your information as required to the IRS as well as any state taxation authority (state regulations may vary.) Your information will generally be turned over to the IRS or otherwise disposed of by the end of April. If you are e-filing, we retain data (such as city, state, and zip code information and return information collected at the site level such as total returns by filing status or total EITC payment) for program analysis. This information does not include names, social security numbers, or other personally identifiable information about any individuals.</p> <p>If you choose, we can also keep your tax return information to help us prepare your e-file tax return next year. We would then use general information like your name, address, birth date, identification numbers, and employer address) to help with next year's filing. This information would not be shared with any unauthorized persons and will not be sold, given away, or used for commercial purposes.</p> <p>If you would like AARP Tax-Aide to keep your information to help prepare next year's tax return, please sign below. Service will not be denied if you do not want us to keep this information.</p> <p>AARP Tax-Aide volunteers are trained and IRS certified to assist you in filing your tax return (s), not to provide legal or financial advice. Because the assistance provided to you is free, AARP Foundation and AARP Tax-Aide volunteers are not, and do not represent themselves to be, tax return preparers or tax professionals under federal state law and will not and cannot ensure the accuracy of your return. Please review your return (s) to make sure it is complete and correct. You, and not the AARP Foundation or the Tax-Aide volunteer, are solely responsible for the accuracy of your return (s). If there is any underpayment of tax, you are responsible for paying it, plus any interest and penalty that may be due.</p> <p>Taxpayer signature _____ Spouse Signature _____ Date _____</p>
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