

# Tax Client Interview Sheet

## Contact Information

Home Phone Number \_\_\_\_\_

Email Address \_\_\_\_\_

Work Phone Number \_\_\_\_\_

Mailing Address \_\_\_\_\_

Cell Phone Number \_\_\_\_\_

## Taxpayer

Name\* \_\_\_\_\_

Occupation \_\_\_\_\_

Date of Birth \_\_\_\_\_

Did you receive an AK Permanent Fund Dividend Y / N

Social Security # \_\_\_\_\_

## Spouse

Name\* \_\_\_\_\_

Occupation \_\_\_\_\_

Date of Birth \_\_\_\_\_

Did you receive an AK Permanent Fund Dividend Y / N

Social Security # \_\_\_\_\_

## Dependents

Dependent #1 Name\* \_\_\_\_\_

Relationship \_\_\_\_\_

SSN \_\_\_\_\_

Date of Birth \_\_\_\_\_

Number of Months dependent lived in your home during tax year \_\_\_\_\_

Did they receive a PFD Y / N

\*\*Would you like to claim your child's PFD on your return ? Y / N

Dependent #2 Name\* \_\_\_\_\_

Relationship \_\_\_\_\_

SSN \_\_\_\_\_

Date of Birth \_\_\_\_\_

Number of Months dependent lived in your home during tax year \_\_\_\_\_

PFD Y / N

\*\*Would you like to claim your child's PFD on your return ? Y / N

Dependent #3 Name\* \_\_\_\_\_

Relationship \_\_\_\_\_

SSN \_\_\_\_\_

Date of Birth \_\_\_\_\_

Number of Months dependent lived in your home during tax year \_\_\_\_\_

PFD Y / N

\*\*Would you like to claim your child's PFD on your return ? Y / N

Dependent #4 Name\* \_\_\_\_\_

Relationship \_\_\_\_\_

SSN \_\_\_\_\_

Date of Birth \_\_\_\_\_

Number of Months dependent lived in your home during tax year \_\_\_\_\_

PFD Y / N

\*\*Would you like to claim your child's PFD on your return ? Y / N

**Other Misc. Questions**

Did you move in or out of the State of AK in the last year?      Y / N      If yes please answer the remaining questions!

State you moved from ?      \_\_\_\_\_      Dates of Residency \_\_\_\_\_ to \_\_\_\_\_

State you moved into?      \_\_\_\_\_      Dates of Residency \_\_\_\_\_ to \_\_\_\_\_

Did you have any unreimbursed Moving Expenses?      Y / N      If yes please answer the remaining questions!

City you moved from?      \_\_\_\_\_

City you moved to?      \_\_\_\_\_

Please bring in all documentation of all expenses related to moving

\* Name as it appears on Social Security Card

\*\* You can claim your child's PFD on your return on if they are under 18 and did not receive wages.

For additional dependents please fill out info on a separate sheet.