

Tax Client Interview Sheet

| Contact Information | |
|---|---|
| Phone Number- Taxpayer _____ | Email Address _____ |
| Phone Number - Spouse _____ | Mailing Address _____ |
| Alternate Number _____ | _____ |
| Taxpayer | Spouse |
| Name* _____ | Name* _____ |
| Occupation _____ | Occupation _____ |
| Date of Birth _____ | Date of Birth _____ |
| Did you receive an AK Permanent Fund Dividend Y / N | Did you receive an AK Permanent Fund Dividend Y / N |
| Social Security # _____ | Social Security # _____ |
| 2021 Advance Child Tax Credit _____ | 2021 Advance Child Tax Credit _____ |
| ***2021 Economic Impact Pmt Amount _____ | ***2021 Economic Impact Pmt Amount _____ |
| 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 |
| 2021 Economic Impact Pmt Amount _____ | Education Expenses? Y / N (please provide 1098-T/Info) |
| 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 |
| 2021 Economic Impact Pmt Amount _____ | Education Expenses? Y / N (please provide 1098-T/Info) |
| 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 |
| 2021 Economic Impact Pmt Amount _____ | Education Expenses? Y / N (please provide 1098-T/Info) |
| 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 |
| 2021 Economic Impact Pmt Amount _____ | Education Expenses? Y / N (please provide 1098-T/Info) |
| 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 _____ |
| Additional Notes or Questions: | |
| | |

* 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.

****The 2021 Economic Impact Payment was \$1400 per person, but may have been different if subject to phase out- please provide the exact amount received per person

Note Re: Advance Child Tax Credit: Please include the IRS letter 6419 with your tax documents

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