

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.