

FORT MEADE MILITARY COMMUNITY TAX CENTER

TAX RETURN WORKSHEET

You must have the ROUTING NUMBER and ACCOUNT NUMBER for your bank prior to signing in. Please complete all information before your appointment. Please print all information. If you are uncertain of an answer, leave that information blank

1) Did you file with us last year? _____

2) Do you own a business? If so, see the receptionist.

3) Taxpayer's full name: _____
Maiden name: _____ Have you reported your new name to the Social Security Administration? Yes / No

Social Security #: _____ Birth Date: _____
Home Phone #: _____ Work #: _____
Home Address: _____ City: _____ State: _____
Zip Code: _____
Cell Phone # _____
Email: _____

4) Did your filing status change in 2001? (Did you marry, divorce, separate or become widowed?)

5) Spouse's full name: _____
Maiden name: _____ Have you reported your new name to Social Security Administration? Yes / No

Social Security #: _____ Birth Date: _____
Home Phone #: _____ Work #: _____
Home Address: _____ City: _____ State: _____
Zip Code: _____
Cell Phone # _____
Email: _____

6) Military Personnel: What is your state of Legal Residence (on your LES) for taxes? _____

(SEE REVERSE)

7) What is your filing status:

Single Married Filing Joint Qualifying Widow(er)
 Head of Household Married Filing Separate NOT SURE (Discuss with preparer)

8) Exemption Information:

NOTE: SSN – Name must match Social Security Card

Dependent(s) Full Name First/Last	Social Security # & Relationship of Dependent	Date of Birth MM/DD/YYYY	Months in Home	Paid Child Care/College
				Y / N
				Y / N
				Y / N
				Y/ N
				Y / N

9) Bank information: Checking: _____ Savings: _____ **(Check One)**

Routing #: _____

Accounting #: _____

10) CHECK ALL THAT APPLY:

INCOME:

Interest on Accounts?
 Unemployment Compensation?

(1040A)

Ordinary Dividends?
 IRA Distributions?
 Pension or Annuity Income?
 Social Security Benefits?

(1040 Long Form)

Taxable refunds (only if you itemized your deductions last year)?

Alimony?

Business Income (or losses)?

Capital Gains (or losses)?

Rental Property Income (or loss)?

DEDUCTIONS:

(1040A)

Did you contribute to a traditional IRA?

Did you pay interest on a student loan?

(1040 Long Form)

Did you contribute to a Medical Savings Account?

Did you have any Moving Expenses?

Do you owe any Self-Employment Tax?

Did you pay any Alimony? To Who (Name): _____ SSN: _____

Did you pay any Mortgage Interest?

CREDITS:

Did you pay any Child Care Expenses?

Providers Name and Address	Social Security # or Federal Tax ID Number	Amount Paid		

At the end of 2001, were you or your spouse age 65 or older? Blind?

Did you, your spouse or dependent attend College during 2001?

Did you pay any Adoption Expenses last year?

(1040 Long Form)

Did you pay any income tax to a foreign country last year?

(SEE REVERSE)

11) Did you (or anyone else for purposes of this tax return) go to college or any other post-secondary education school during 2001? If so, do you have supporting documentation with you for your out of pocket expenses (i.e. tuition not paid by the government or your employer). (NOTE: For the first two-years of college, the Hope Education Credit applies. For most schooling after the first two-years of college, the Lifetime Learning Credit applies).

12) Did you or your spouse work in Virginia? Y / N

13) Did you or your spouse work in Maryland? Y / N

14) The following forms are attached:

All W2(s): Y / N

All IRA information: Y / N

All 1099(s): Y / N

Interest on College Loans: Y / N

All 1098: Y / N

Power of Attorney: Y / N

Copy of last years return: Y / N

Copy / Canceled Check: Y / N

15) Were you deployed in a special combat area during 2001? (These areas *do not* include Korea, Germany or the like). If so, where? And for what months during 2001?

16) Do you (and/or your spouse) wish to contribute \$3.00 to the Presidential Campaign Fund? (Please note this does *not* reduce your refund at all).

YOU: YES/NO

SPOUSE: YES/NO

17) Did another taxpayer claim you as a dependent or exemption in 2001? (ex. parents, spouse).

18) Did you receive a tax rebate check in 2001? Has your filing status changed from 2000 to 2001?

19) Completed and signed tax return: _____

20) Preparer's Signature: