

Intake Interview Sheet 2025 – Precisely Tax Solutions Corp

17. **Childcare Expenses:** Paid \$ _____ Provider's Name _____
SSN or EIN _____ Phone _____
Address _____ City _____ State _____ Zip _____
❖ Have you received Form W-10 from the provider? **Yes** ____ **No** ____ Did you make a request for it? **Yes** ____ **No** ____
18. **Education Expenses:** School Name _____
Address _____ City _____ State _____ Zip Code _____
School EIN _____ Were you enrolled for at least one semester in 2025? **Yes** ____ **No** ____
- a. Were you a Part-time or a Full-time student, and do you have any proof of enrollment? **Yes** ____ **No** ____
b. **How much did you personally pay for the following:** Tuition \$ _____ Education Materials \$ _____
c. Have you submitted payments toward your student loan? **Yes** ____ **No** ____.
19. **Were you a participant in a 529 Education Savings plan during 2025?** **Yes** ____ **No** ____.
20. Did you and every person in your household have **Health Insurance Coverage** in 2025? **Yes** ____ **No** ____
Is from Obamacare or Marketplace? **Yes** ____ **No** ____ **Did you receive Form 1095-A?** **Yes** ____ **No** ____
21. Were you married, but lived apart from your spouse for **The Last Six Months** of 2025? **Yes** ____ **No** ____
If yes, can you provide proof? **Yes** ____ **No** ____ **Examples:** Separation Agreement, Lease, Utility bill, etc.

22. **Estimated tax payments made to the IRS or any State?** **Yes** ____ **No** ____

Payment to	Date	Apr 15th, 2025	Jun 17th, 2025	Sep 16th, 2025	Jan 15th, 2026
IRS					
State/City					

23. **Have you resided in public housing or utilized rental assistance programs such as Section 8 or PHEPS?** **Yes** ____ **No** ____ If yes, how much was your monthly rent payment in 2025? \$ _____

List Your Basic Monthly Home Living Expenses for the year 2025

Rent _____ Electricity _____ Gas Natural _____ Cable _____ Clothing _____
Food _____ Insurance _____ Water _____ Telephone _____ Other Exp _____

24. Did you Finance a "Gas" vehicle in 2025? **Yes** ____ **No** ____ . Make _____ Model _____
VIN # _____ How much did you pay in interests in 2025? \$ _____
25. Did you buy an electric car on or before 09/30/2025? **Yes** ____ **No** ____ . Make _____ Model _____
VIN # _____ What was the purchase price? \$ _____
26. Have you been audited by the IRS or any State? **Yes** ____ **No** ____
27. **Has the Earned Income Credit (EIC), Education Credit, or any other refundable tax credit been disallowed to you in previous years?** **Yes** ____ **No** ____.
28. Did you purchase and install home **Energy-Efficient** items like Doors, Windows, Central AC, a Furnace, Solar Panels, Heat Pumps, Water Heaters, Insulation materials, etc.? **Yes** ____ **No** ____
29. **Had your credit card, mortgage, or other debt cancelled or forgiven by a lender?** **Yes** ____ **No** ____
30. Did you earn any income from renting out your house or a room? **Yes** ____ **No** ____
31. **Did you receive any income from sources outside the USA** such as pensions, investments, interest, rent, royalties, etc.? **Yes** ____ **No** ____

TAXPAYER ATTESTATION

By signing this questionnaire, I certify under penalty of perjury that I have examined this document and that all the information contained in it was provided by me and to the best of my knowledge and belief is true, correct, and complete. I authorize PRECISELY TAX SOLUTIONS CORP to use this information to prepare my 2025 income tax return for which I have adequate records. I understand any false or misleading information may result in additional taxes, interest, and penalties. I also authorize them to send me information regarding additional financial services and other products offered.

Taxpayer	Spouse	Date
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PREPARE'S ATTESTATION

I attest that all information acquired in this questionnaire was obtained from _____, who provided it voluntarily, and to the best of my knowledge is true, correct and complete.

Preparer's Signature	Date
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1. Name _____ Social Security # _____
Date of Birth _____ Occupation _____
Address _____ Apt _____ City _____ State _____ Zip _____
E-mail _____ Cell _____ Home _____
2. Marital Status: Single _____ Married _____ Separated _____ Divorced _____ Widower _____
3. Spouse Name _____ Social Security # _____
Date of Birth _____ Occupation _____
E-mail _____ Cell _____ Work _____
4. Bank Information: Bank Name _____ Checking _____ Savings _____
Routing # (ABA) _____ Account # _____
5. Refund Options: Direct Deposit _____ Refund Check Printed in our Office _____
6. Do you want to use your refund to pay for the office service fee? extra fees apply. Yes _____ No _____
Did you receive any of the following types of income? Soc Sec _____ Disability _____ Royalties _____
Dividends _____ Interests _____ Gambling Winnings _____ Tips _____ Retirement _____ Alimony _____
Rental Income _____ Foreign Income _____ Unemployment Benefits _____ Cancelled Debts? _____
Sell of your Home? _____ Digital Assets _____ Jury Duty _____ Other _____
7. Did you receive any of the following IRS forms? W-2, W-2G, K-1, 1098-Mortgage, 1099-B, 1098-E, 1098-T Any of these Form 1099? A, B, C, E, G, K, Q, DIV, INT, MISC, NEC, SSA, Yes _____ No _____
8. Did you receive any Non-Taxable Income such as Child Support _____ Housing Subsidy _____
Public Assistance _____ Food Stamps _____ Family Support _____ Other Sources _____
9. Do you have any foreign bank accounts? Yes _____ No _____ With more than US\$10,000 during 2025?
Yes _____ No _____ If yes, did you file your Foreign Bank Account Reporting (FBAR)? Yes _____ No _____
10. Provide Dependents Information Here

Dependent Full Name	Date of Birth	Social Security Number	Relationship	Number of Months He/She Lived with you in 2025

11. To qualify for the EIC and other refundable credits these questions must be answered.
- a. Did your dependents live with you for over 6 months in 2025? Yes _____ No _____
- b. Was your child a US citizen or legal resident alien for more than 6 months in 2025? Yes _____ No _____
- c. Is it possible for someone else to claim you or any of your dependents? Yes _____ No _____
- d. Did your dependents earn taxable or investment income? Yes _____ No _____
- e. Were you (or your spouse, if filing jointly) a non-resident alien at any point in 2025? Yes _____ No _____
- f. Have you received investment income exceeding \$11,950.00 in 2025? Yes _____ No _____
2. In 2025, was your child at least a half-time student if between the ages of 18 & 24? Yes _____ No _____
3. If yes, what school did your dependent(s) attend?

Name of School for Dependent No. 1	Name of School for Dependent No. 2	Name of School for Dependent No. 3

12. Is there any Form 8332, Release or Revocation of Claim to Exemption for Child, by custodial parent for the year 2025? Yes _____ No _____.
13. Did you provide over 50% of the total support for each dependent you are claiming? Yes _____ No _____
14. Has anyone else helped you financially? Yes _____ No _____. If yes, from whom? _____
15. If claiming a child who is not your son or daughter, is your adjusted gross income (AGI) higher than the AGI of their parents? Yes _____ No _____.
16. If the child(ren)'s biological parents do not live with them, where are the parents?

Where is the mother? of Child No. 1?	Where is the mother? of Child No. 2?	Where is the mother? of Child No. 3?
Where is the father? of Child No. 1?	Where is the father? of Child No. 2?	Where is the father? of Child No. 3?