Form <b>13614-C</b> (Rev. 10-2011)	Department of the Treasury – Internal Revenue Service Intake/Interview & Quality Review Sheet	OMB # 1545-1964

### Section A. You should complete Pages 1-3

Thank you for allowing us to prepare your tax return. You are responsible for the information on your return so please provide complete and accurate information to the certified tax preparer. If you have any questions please ask your preparer.

### You will need your:

- Tax information such as Forms W-2, 1099, 1098.
- · Social security cards or ITIN letters for you and all persons on your tax return.
- · Proof of Identity (such as a valid drivers license or other government issued picture ID).

						. ,				
Part I. Your Personal Inform	nation									
Your First Name	1	M. I.	Last Nam	ne					ou <u>a U</u> .S. (	Citizen?
Joshi			Barufkin					X Ye		
2. Spouse's First Name		M. I.	Last Nam	ie						. Citizen?
Anshu			Nagesh					X Ye	s 🗌 No	
<ol><li>Mailing Address</li></ol>		Apt#	City				State		Code	
876 Kealing Ave.		9A	Wyd	ckoff			NJ	074	481	
4. Contact Information Phone: 201-555-2345	Cell Phone	∋:			E-mail:					
5. Your Date of Birth	6. Your Jo	b Title	)	1	Are you:	7. Lega	lly Bli	nd	Yes	s 🗙 No
11/18/1977	Bus Driver			8	3. Totally	and Perman	ently	Disable	ed 🗌 Yes	s 🗵 No
9. Spouse's Date of Birth	10. Spouse	's Job	Title	ls	Spouse:	11. Lega	lly Blir	nd	Yes	s 🗙 No
08/07/1979	Custodian			12	2. Totally	and Perman	ently	Disable	ed 🗌 Yes	s ⊠ No
13. Can anyone claim you or yo	our spouse or	n their	tax return?	?	Yes 🛛	No 🗌 Unsu	re			
Part II. Marital Status and	l Househo	ld In	formatio	n						
1. As of December 31, 2011, v Single Married: Did you live wit Divorced or Legally Sep	h your spous arated: Date									
Widowed: Year of spous										
<ol><li>List names below of everyor lived outside of your home the list on page 3.</li></ol>										
Name (first, last) Do not enter your name or spouse's name below.	Date of B (mm/dd/y		elationship to (e.g. daughte son, mother sister, none	er, r,	Number of months lived in your home in 2011	US Citizen of resident of the US, Canada of Mexico in 201 (yes/no)	e :	Marital Status as of 2/31/11 (S/M)	Full- time student in 2011 (yes/no)	Received less than \$3700 income in 2011 (yes/no)
(a)	(b)		(c)		(d)	(e)		(f)	(g)	(h)
Alice Nagesh	04/14/0	)2	Daughter	r	12	yes		S	Yes	Yes
Samual Barufkin	01/06/0	)5	Son		12	Yes		S	Yes	Yes
				$\neg \uparrow$						
. Voluntoera accieting wi	th necession					nuovida bi	سام	ualitu.		

- Volunteers assisting with preparing your return are trained to provide high quality service and uphold the highest ethical standards.
- To report unethical behavior to IRS, email us at wi.voltax@irs.gov or call toll free 1-877-330-1205.

To check the status of your REFUND visit "Where's My Refund?" on <u>www.irs.gov</u> or call 1-800-829-1954 for assistance.

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Part III. Income – In 2011, did you (or your spouse) receive:         Yes       No       Unsure         □       1. Wages or Salary? (Form W-2)         □       2. Tip Income?         □       3. Scholarships? (Forms W-2, 1098-T)         □       4. Interest/Dividends from: checking/savings accounts, bonds, CDs, brokerage? (Forms 1099-INT, 1099-DIV)         □       X       5. Refund of state/local income taxes? (Form 1099-G)
X       1. Wages or Salary? (Form W-2)         X       2. Tip Income?         X       3. Scholarships? (Forms W-2, 1098-T)         X       4. Interest/Dividends from: checking/savings accounts, bonds, CDs, brokerage? (Forms 1099-INT, 1099-DIV)         X       5. Refund of state/local income taxes? (Form 1099-G)
☐ 区 ☐ 5. Refund of state/local income taxes? (Form 1099-G)
<ul> <li>Self-Employment payments (such as cash received for services, small business)? (Form 1099-MISC</li> <li>Image: Self-Employment payments (such as cash received for services, small business)? (Form 1099-MISC</li> <li>Image: Self-Employment payments (such as cash received for services, small business)? (Form 1099-MISC</li> <li>Image: Self-Employment payments (such as cash received for services, small business)? (Form 1099-MISC</li> <li>Image: Self-Employment payments (such as cash received for services, small business)? (Form 1099-MISC</li> <li>Image: Self-Employment payments (such as cash received for services, small business)? (Form 1099-MISC</li> <li>Image: Self-Employment payments (such as cash received for services, small business)? (Form 1099-MISC</li> <li>Image: Self-Employment payments (such as cash received for services, small business)? (Form 1099-MISC</li> <li>Image: Self-Employment payments (such as cash received for services, small business)? (Form 1099-MISC</li> <li>Image: Self-Employment payments (such as cash received for services, small business)? (Form 1099-B)</li> </ul>
<ul> <li>□ Social Security or Railroad Retirement Benefits? (Forms SSA-1099, RRB-1099)</li> <li>□ Income (or loss) from Rental Property?</li> <li< td=""></li<></ul>
Part IV. Expenses – In 2011 Did you (or your spouse) pay:
Yes No Unsure  □ X □ 1. Alimony: If yes, do you have the recipient's SSN? □ Yes □ No □ X □ 2. Contributions to a retirement account? □ IRA □ Roth IRA □ 401K □ Other □ X □ 3. Educational expenses paid for yourself, spouse or dependents, such as tuitions, books, fees, etc.?  (Form 1098-T)
<ul> <li>□ ★ □ 4. Unreimbursed employee business expenses (such as teacher supplies, uniforms or mileage)?</li> <li>□ ★ □ 5. Medical expenses (including health insurance premiums)?</li> <li>□ ★ □ 6. Home mortgage interest? (Form 1098)</li> <li>□ ★ □ 7. Real estate taxes for your home or personal property taxes for your vehicle? (Form 1098)</li> <li>□ ★ □ 8. Charitable contributions?</li> <li>□ ★ □ 9. Child/dependent care expenses, such as day-care?</li> </ul>
Part V. Life Events – In 2011 Did you (or your spouse):
Yes       No       Unsure         □       □       1. Have a Health Savings Account? (Forms 5498-SA, 1099-A, W-2 with code W in Box 12)         □       □       2. Have debt from a mortgage or credit card canceled/forgiven by a commercial lender? (Form 1099-C)         □       □       3. Buy, sell or have a foreclosure of your home? (Form 1099-A)         □       □       4. Have Earned Income Credit (EIC) disallowed in a prior year? If yes, for which tax year?         □       □       5. Purchase and install energy efficient home items (such as windows, furnace, insulation, etc.)?         □       □       6. Live in an area that was affected by a natural disaster? If yes, where?         □       □       7. Receive the First Time Homebuyers Credit in 2008?         □       □       8. Pay any student loan interest? (Form 1098-E)         □       □       9. Make estimated tax payments or apply last year's refund to your 2011 tax? If so how much?
□ □ □ □ □ □ □ □ □ □ □ □ □ □ □ □ □ □ □

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Additional information and Questions related to the preparation of your	return
Many free tax preparation sites operate by receiving grant money. The data from the following be used by this site to apply for these grants. Your answers will be used only for statistical purely to the second of	
Other than English what language is spoken in the home? <u>Hindustani</u>	
Are you or a member of your household considered disabled?	
If you are due a refund or have a balance due:	
<ul> <li>Ask your preparer about Direct Deposit. It is the fastest, easiest way to receive your tax refund. As means a fast refund. Taxpayers who combine e-file and Direct Deposit can get their refunds in as</li> </ul>	
<ul> <li>Ask your preparer about purchasing Series I U.S. Savings Bonds with part or all of your tax refundare a safe and secure way to invest in the future. Purchase I Bonds for yourself or others in multiplearn interest for up to 30 years.</li> </ul>	
If you are due a refund, would you like a direct deposit?	☐ Yes ☒ No
If you are due a refund, would you like information on how to purchase U.S. Savings Bonds?	Yes X No
If you are due a refund, would you like information on how to split your refund between accounts?	Yes X No
If you have a balance due, would you like to make a payment directly from your bank account?	☐ Yes 🕱 No
Additional comments:	
STOP HERE! Thank you for completing this form. Please give this form to the certified volunteer preparer for use in preparing your re	eturn.

Your Civil Rights are Protected: It is the Internal Revenue Service's mission to provide America's taxpayers top quality service by helping them understand and meet their tax responsibilities and by applying the tax law with integrity and fairness to all. Under no circumstances will the Internal Revenue Service tolerate discrimination by its employees, grantees, contractors, and/or subcontractors. NO ONE shall be excluded from participating in, be denied the benefits of, or be subject to discrimination because of race, color, sex, national origin, disability, reprisal, or age in programs or activities funded by the Department of Treasury – Internal criefic and against on the basis of race, color, sex, national origin, disability, reprisal or age in programs or activities receiving financial assistance (e.g. Low-Income Tax Clinics, Tax Counseling for the Elderly) from the Department of Treasury IRS, may submit a written complaint to: National Headquarters; Office of Equity, Diversity & Inclusion; Internal Revenue Service; Attn: Director, Civil Rights Division (External Civil Rights Team); 1111 Constitution Ave., NW Room 2422; Washington, DC 20224.

#### **Paperwork Reduction Act Notice**

The Paperwork Reduction Act requires that the IRS display an OMB control number on all public information requests. The OMB Control Number for this study is 1545-1964. Also, if you have any comments regarding the time estimates associated with this study or suggestion on making this process simpler, please write to the Internal Revenue Service, Tax Products Coordinating Committee, SE:W:CAR:MP:T:T:SP, 1111 Constitution Ave. NW, Washington, DC 20224.

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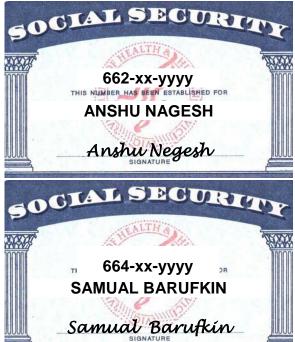
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### **Interview Notes:**

- 1. By consulting your preparer resources you determine that the correct filing status for the Barufkins is Married Filing Jointly.
- 2. After asking the questions in Part B of the Intake/Interview Sheet you determine that Joshi & Anshu provide full support for Alice & Samual.
- 3. After examining last year's return, you determine that the Barufkins did not itemize deductions last year.
- 4. The Barufkins paid \$15,200 in rent for the year.
- 5. Joshi & Anshu's decision to contribute to the gubernatorial election campaign fund is the same as the presidential election campaign fund.
- 6. The Barufkins are US citizens (i.e. they are not non-resident aliens).
- 7. Neither of the Barufkins can be a qualifying child of another person for EIC purposes. No other person can claim either child for EIC.
- 8. The SSN for both children is valid for EIC purposes.
- 9. The Barufkins have never had their EIC reduced or disallowed.
- 10. By consulting your preparer resources you determine that Wyckoff is located in Bergen County NJ Code 0270
- 11. The Barufkins had no out-of-state purchases on which they did not pay Use tax.
- 12. Both children are covered by health insurance.

## **Documents:**





	a Employee's social security number 661-xx-yyyy	OMB No. 1545		Safe, accurate FAST! Use	e, ase		the IRS website at v.irs.gov/efile	
b Employer identification number (EIN) 66-9xxyyyy				22,810.49  2 Federal income tax withheld 2,281.00				
c Employer's name, address, and ZIP code United Airlines				ocial security wages 4 Social security tax withheld 22,810.49 958.04			.04	
PO Box 6610 Chicago, IL 60610				dicaré wages and tips   6   Medicare tax withheld			.75	
d Control number			9			10 Dependent ca	are benefits	
e Employee's first name and initial	Last name	Suff.	<b>11</b> Nor	nqualified plans	<b>.</b>	12a See instructi	ons for box 12	
Joshi Barufkin 876 Kealing Ave.	Apt 9A		13 Statu	utory Retiremer loyee plan	nt Third-party sick pay	12b		
Wyckoff, NJ 0748	•			JSDI 1	14.05	12c		
f Employee's address and ZIP code					6.94 3.69	12d		
15 State Employer's state ID number NJ   669xxyyyy	er 16 State wages, tips, etc. 22,810.4	17 State incom		18 Local wage	s, tips, etc.	19 Local income tax	20 Locality name	
Form W-2 Wage and Statement	Tax –	2011	J		Department o	of the Treasury-Inter	nal Revenue Service	
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	e's social security number	OMB No. 1545		Safe, acc FAST! Us	e urate,	≁file	Visit the www.irs	e IRS website at s.gov/efile	
b Employer identification number (EIN)				1 Wages, tips, other compensation 2 Federal income tax v					
66-9ххуууу				13,180.00			275.00		
c Employer's name, address, and ZIP code			3 Social security wages			4 Social security tax withheld			
United Airlines			13,180.00			_	553.56		
PO Box 6610			5 Medicare wages and tips				6 Medicare tax withheld		
Chicago, IL 60610			13,180.00			191.11			
			7 Social security tips			8 Alloca	8 Allocated tips		
d Control number			9			10 Depe	ndent care	benefits	
e Employee's first name and initial Last nar	me	Suff.	<b>11</b> Nor	nqualified	plans	12a See i	nstructions	s for box 12	
Anshu Nagesh			13 Statu	itory Re	tirement Third-party	12b			
876 Kealing Ave. Apt 9	Α		empi	oyee pa	in sick pay	C			
Wyckoff, NJ 07481	•		14 Oth			12c			
Wyckon, 145 07 401			NJSDI 65.90 NJSUI 56.02		12d				
			N.	JFLI	7.91	d e			
f Employee's address and ZIP code									
15 State Employer's state ID number	16 State wages, tips, etc.	17 State incom		18 Local	wages, tips, etc.	19 Local inco	ome tax	20 Locality name	
NJ   669xxyyyy	13,180.00	260.0	)0						
Form <b>W-2</b> Wage and Tax Statement	_	2011	ı		Department of	of the Treasur	y-Internal	Revenue Service	
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