Form 13614-C (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.

Vali	will	lnaad	your:
ı ou	VV 11	Heeu	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 value) 	alid drivers lice	ense	or other gover	nment issue	ed picture ID).					
Part I. Your Personal Inform	nation										
Your First Name			Last Name Are you a U.S. Cit						Citizen?		
Charles			Conway				X Ye				
Spouse's First Name	M.	. I.	Last Name					use a U.S s □ No	. Citizen?		
Carol M			Conway	Conway							
Mailing Address910 Birch St.	Α	pt#	City State Jersey City NJ					Zip Code 07310			
4. Contact Information Phone: 201-999-9999	Cell Phone:			E-mail:	conway910	@myı	mail.ne	t			
5. Your Date of Birth	6. Your Job	Title		Are you: 7. Legally Blind ☐ Yes ☒ No							
03/15/1981	Engineer			8. Totally	and Perman	ently I	Disable	ed 🗌 Yes	× No		
9. Spouse's Date of Birth 10. Spouse's Job Title 02/28/1983 Teacher				Is Spouse: 11. Legally Blind Yes X No 12. Totally and Permanently Disabled Yes X No							
13. Can anyone claim you or yo	ur spouse on t	heir		☐Yes 🗵							
Part II. Marital Status and	l Household	d Int	formation								
 As of December 31, 2011, w Single Married: Did you live wit Divorced or Legally Sep 	h your spouse							s 🗌 No			
☐ Widowed: Year of spous	se's death:										
List names below of everyor lived outside of your home the list on page 3.											
Name (first, last) Do not enter your name or spouse's name below.	Date of Birti (mm/dd/yy)		elationship to you (e.g. daughter, son, mother, sister, none)	Number of months lived in your home in 2011	US Citizen o resident of th US, Canada o Mexico in 201 (yes/no)	e S or 1 12	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)		

- . 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 www.irs.gov or call 1-800-829-1954 for assistance.

Catalog Number 52121E

Form **13614-C** (Rev. 10-2011)

Section A. Please complete – check Yes, No or Unsure to all questions below. Please ask if you need help.
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) S. Refund of state/local income taxes? (Form 1099-G) S. 6. Alimony Income? 7. Self-Employment payments (such as cash received for services, small business)? (Form 1099-MISC) S. 8. Income (or loss) from the sale of Stocks, Bonds or Real Estate (including your home)? (Forms 1099-S, 1099-B)
Similar Notes C, 1665 B)
Part IV. Expenses – In 2011 Did you (or your spouse) pay:
Yes No Unsure □ □ 1. Alimony: If yes, do you have the recipient's SSN? □ Yes □ No □ □ 2. Contributions to a retirement account? □ IRA □ Roth IRA □ 401K □ Other □ □ 3. Educational expenses paid for yourself, spouse or dependents, such as tuitions, books, fees, etc.?
(Form 1098-T)
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?
□ □ □ 10. Attend school as a full time student? (Form 1098-T) □ □ 11. Adopt a child? □ □ 12. File a 2010 federal tax return containing a "capital loss carryover" on Form 1040 Schedule D? Presidential Election Campaign Fund: (If you check a box, your tax or refund will not change.) Check here if you, or your spouse if filing jointly, want \$3 to go to this fund □ You □ Spouse Catalog Number 52121E Form 13614-C (Rev. 10-2011)

10-07-2012 TY2011 v1.0 Page 2 of 6

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 questions may be used by this site to apply for these grants. Your answers will be used only for statistical purposes. Other than English what language is spoken in the home? No If you are due a refund or have a balance due: Ask your preparer about Direct Deposit. It is the fastest, easiest way to receive your tax refund. An e-filed return means a fast refund. Taxpayers who combine e-file and Direct Deposit can get their refunds in as few as 10 days. Ask your preparer about purchasing Series I U.S. Savings Bonds with part or all of your tax refund. Savings bonds are a safe and secure way to invest in the future. Purchase I Bonds for yourself or others in multiples of \$50 and earn interest for up to 30 years. If you are due a refund, would you like a direct deposit? X Yes No Yes X No If you are due a refund, would you like information on how to purchase U.S. Savings Bonds? 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 X 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 return.

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 Revenue Service. Any person who believes that he/she has been discriminated 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.

Catalog Number 52121E

Form **13614-C** (Rev. 10-2011)

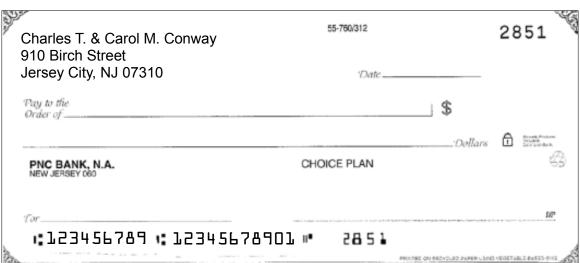
3

Interview Notes:

- 1. By consulting your preparer resources you determine that the correct filing status for the Conways is Married Filing Jointly.
- 2. The Conways did not itemize deductions last year.
- 3. The Conways moved from an apartment in Hoboken to an apartment in Jersey City on September 30 of the current tax year. They paid \$2,000/month rent in Hoboken through September and \$1,000/month in Jersey City starting in October.
- 4. Charles lost his job in August of the current tax year and collected unemployment for the balance of the year.
- 5. In January of the tax year the Conways purchased a 50" LCD TV from Amazon.com and did not pay sales tax on the purchase amount of \$1,500.00. The sales tax amount would have been \$105.00.
- 6. The Conway's decision to contribute to the gubernatorial election campaign fund is the same as the presidential election campaign fund.
- 7. By consulting your preparer resources you determine that Jersey City is located in Hudson County NJ Code is 0906

Documents:





10-07-2012 TY2011 v1.0 Page 4 of 6

	a Employee's social security r		No. 1545-0008	Safe, accura FAST! Use	te,		ne IRS website at irs.gov/efile		
b Employer identification number (in 62-9xxyyyy	EIN)			ages, tips, other 32,867.0		2 Federal income 4,500.0			
c Employer's name, address, and 2		ocial security w		4 Social security tax withheld					
Vampire Engineeri 32 Blood Ave.	ng			33,867.0 edicare wages			1,422.41 6 Medicare tax withheld		
Jersey City, NJ 07	310			33,867.	00	491.07	491.07		
Jersey City, No 07	310		7 Sc	ocial security tip	os	8 Allocated tips	8 Allocated tips		
d Control number			9			10 Dependent care	e benefits		
e Employee's first name and initial	Last name		Suff. 11 No	onqualified plar	ıs	12a See instruction			
Charles T. Conway	I		13 Sta	itutory Retirem			00.000		
967 Water St.	,		em	ployée plan	sick pay	Code			
Hoboken, NJ 0703	80		14 Ott	her SDI 148	.00	12c	12c		
			NJ	SUI 125	.80	12d			
f Employee's address and ZIP code				FLI 17.	76	d e			
15 State Employer's state ID num NJ 62-9xxyyyy	33,867		te income tax 1,020.00	18 Local wag	ges, tips, etc.	19 Local income tax	20 Locality name		
	044								
W-2 Wage and Statemen	d Tax nt	20	11		Department	of the Treasury-Interna	al Revenue Service		
Copy B—To Be Filed With Emp This information is being furnished									

		_								
	mployee's social security number 622-xx-yyyy	OMB No. 1545		Safe, a FAST! I	ccurate, Use	≁file	Visit the www.ir	e IRS website at s.gov/efile		
b Employer identification number (EIN) 62-8xxyyyy					other compensation 76.00		leral income 3,350.0			
c Employer's name, address, and ZIP co	ndo.									
Smart Kids Charter			3 Social security wages 20,176.00			4 Social security tax withheld 847.39				
98 Willow Lane	0010013		5 Medicare wages and tips				6 Medicare tax withheld			
			20,176.00				292.55			
Boston, MA 02108			7 Social security tips			8 Allo	8 Allocated tips			
d Control number			9			10 Dep	pendent care	benefits		
e Employee's first name and initial L	ast name	Suff.	11 Non	nqualifie	ed plans	12a Se	e instructions	s for box 12		
Carol M. Conway			13 Statut	tory	Retirement Third-party plan sick pay	12b				
910 Birch St.				-,		o d e				
Jersey City, NJ 073	10		14 Othe NJ:	s SDI	100.88	12c				
			NJ:	SUI	85.75	12d				
f Employee's address and ZIP code			NJ	FLI	12.11	d e				
15 State Employer's state ID number NJ 62-8xxyyyy	16 State wages, tips, etc. 20,176.00	17 State incom 403.5		18 Loc	cal wages, tips, etc.	19 Local in	ncome tax	20 Locality name		
	044									
Wage and Ta Statement	ax _	2011	ı		Department of	of the Treas	ury—Internal	Revenue Service		
Copy B—To Be Filed With Employe This information is being furnished to										

10-07-2012 TY2011 v1.0 Page 5 of 6

	☐ CORRE	CTED (if	checked)				
PAYER'S name, street address, city, state, ZIP code, and telephone no. New Jersey Department of Labor PO Box 908 Trenton, NJ 08625			nent compensation	OMB No. 15	45-0120		
			\$ 9,860.10 2 State or local income tax refunds, credits, or offsets		1	Certain Government Payments	
		\$	realts, or offsets	Form 1099-G			
PAYER'S federal identification number 22-2481818	RECIPIENT'S identification number 621-xx-yyyy	3 Box 2 amo	unt is for tax year	4 Federal inco \$ 986.0	ome tax withheld D1	Copy E For Recipien	
RECIPIENT'S name Charles T. Conway		5 ATAA/RTAA payments		6 Taxable gr	rants	The state of the s	
		\$		\$		This is important ta information and i being furnished to th Internal Revenu	
Street address (including apt. no.)		7 Agriculture payments		8 If checked		Service. If you are	
910 Birch St. City, state, and ZIP code Jersey City, NJ 07310 Account number (see instructions)		\$		trade or business income		required to file a return a negligence penalty of	
		9 Market gain \$ 10a State 10b State identific		entification no. 11 State income tax withhel		other sanction may be imposed on you if the income is taxable and the IRS determines the	

10-07-2012 TY2011 v1.0 Page 6 of 6