

# CLIENT QUESTIONNAIRE 20 \_\_\_\_\_

(Please Print Clearly)

**DATE OF PREPARATION** \_\_\_\_\_ **TAX PREPARER'S NAME** \_\_\_\_\_

1- Have we prepared your taxes before? \_\_\_\_\_ if not, how did you hear about us? \_\_\_\_\_

2- Are you a Veteran? \_\_\_\_\_ 3- Would you be willing to be a Spokesperson for NJCA? \_\_\_\_\_

4- Do you have a Bank account? \_\_\_\_\_ 5- Does everyone in your household have health insurance? \_\_\_\_\_

6- Home Owner return: \_\_\_\_\_ 7- Do you heat your home with oil? \_\_\_\_\_ 8- Do you have student loan debt? \_\_\_\_\_

9- ITIN Filer? \_\_\_\_\_ 10- ITIN Application? \_\_\_\_\_

## TAXFILER INFORMATION HERE

Tax Filer's Name \_\_\_\_\_ Last Name \_\_\_\_\_

Spouse Name \_\_\_\_\_ Last Name \_\_\_\_\_

Address \_\_\_\_\_ Apt/Fl. \_\_\_\_\_

City \_\_\_\_\_ County \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Email \_\_\_\_\_

Home or cell # \_\_\_\_\_ Alternate contact number \_\_\_\_\_

Tax filer's DOB \_\_\_\_\_ Age: \_\_\_\_\_ Spouse's DOB \_\_\_\_\_ Age: \_\_\_\_\_

## MARITAL STATUS

Single \_\_\_\_ Married \_\_\_\_ Separated \_\_\_\_ Divorced \_\_\_\_ Widowed \_\_\_\_

## GENDER

Male \_\_\_\_ Female \_\_\_\_

## TAX FILER'S ETHNICITY

Native American/Alaskan National \_\_\_\_ African American/Black \_\_\_\_ Asian/Pacific Islander \_\_\_\_

Multi race \_\_\_\_ Caucasian/White \_\_\_\_ Latino/ Hispanic \_\_\_\_

## SPOUSE'S ETHNICITY

Native American/Alaskan National \_\_\_\_ African American/Black \_\_\_\_ Asian/Pacific Islander \_\_\_\_

Multi race \_\_\_\_ Caucasian/White \_\_\_\_ Latino/ Hispanic \_\_\_\_

## HOUSEHOLD INCOME: Circle one

Under \$15,000      \$15,000-\$25,000      \$25,000 - \$35,000      \$35,000 - \$39,000      \$40,000 - \$50,000

Over \$50,000

## OFFICE USE ONLY – No blanks

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Quality Reviewer Name: \_\_\_\_\_

1- EFILE \_\_\_\_\_

PAPER \_\_\_\_\_

2- FILING STATUS: SINGLE \_\_\_ MFJ \_\_\_ MFS \_\_\_ HEAD OF HOUSEHOLD \_\_\_ QUALIFYING WIDOW \_\_\_

3- FEDERAL REFUND \$ \_\_\_\_\_

4- FEDERAL EITC \$ \_\_\_\_\_

5- NJ STATE REFUND \$ \_\_\_\_\_

6- NJ STATE EITC \$ \_\_\_\_\_

7- OTHER STATE \_\_\_\_\_ REFUND \$ \_\_\_\_\_

8- OTHER STATE \_\_\_\_\_ EITC \$ \_\_\_\_\_

9- CHILD TAX CREDIT \$ \_\_\_\_\_

10- AMERICAN OPPORTUNITY CREDIT \$ \_\_\_\_\_

11- LEARNING LIFETIME CREDIT \$ \_\_\_\_\_

### PROGRAM:

- VITA
- TCE
- VITA (ICC)