

**Berrien County Site Client Intake Form**

**Location:** \_\_\_\_\_

**Name** \_\_\_\_\_

**SSN** \_\_\_\_\_

**1. Rental Residence:** yes no \$paid in 2005 \_\_\_\_\_ Heat included in rent? yes no

Name and address of landlord: \_\_\_\_\_

**2. Total number in household:** \_\_\_\_\_ **3. 2005 Health Insurance Premiums Paid:** \$ \_\_\_\_\_

**4. 2005 Nontaxable Income?** SSI FIA Child SSA Child Support Other

**5. What is your ethnicity:** AA-African American AS-Asian/Pacific Islander CA-Caucasian  
LA-Latino NA-Native American OT-Other NA-No answer

**6. Do you have a bank account?** CH-Checking SA-Savings BO-Both  
NO-Not interested OS-Opened at site

**7. 2005 Tax Preparation?** 0-Didn't file I-Workforce 2-Other VITA site 3-Did own  
4-Family/friend (free) 5-Commercial preparer w/instant refund 6-Paid someone else 7-Other

**8. How did you hear about this site?** 1-Filed here last year 2-Heard radio PSA 3-Flyer/Poster  
4-Newspaper article 5-Friend/Family 6-Church/School/Employer 8-Service Agency

**9. What do you plan to do with any tax refund you receive this year?** 1-Pay Bills 2-Save in bank  
3-Pay down debt 4-Pay for education 5-Down payment on a home 6-Purchase a car  
7-Go on vacation 8-Purchase a large household item 9-Other

***For Preparer Use Only***

Tax Return: Efile Fed/State Efile Fed Only Efile State Only Paper  
Not Finished – will return Not Finished – going elsewhere (reason) \_\_\_\_\_

AGI: \_\_\_\_\_ CTC: \_\_\_\_\_ EITC: \_\_\_\_\_ ACTC: \_\_\_\_\_ Fed Refund: \_\_\_\_\_

Fed Owe: \_\_\_\_\_ MI Refund: \_\_\_\_\_ MI Owe: \_\_\_\_\_ MI CR: \_\_\_\_\_ MI CR7: \_\_\_\_\_

Date: \_\_\_\_\_ Tax Preparer: \_\_\_\_\_ Quality control: \_\_\_\_\_

Notes:  
\_\_\_\_\_  
\_\_\_\_\_

***For Site Coordinator Use Only***

Tax Return Accepted:  Reject Code: \_\_\_\_\_ Resubmitted (date): \_\_\_\_\_

Privacy Statement/Retain Info: yes no Privacy Statement/Mailings: yes no

Amended Return:  Return transmitted by: \_\_\_\_\_