

TAX INFORMATION QUESTIONNAIRE

Name:

KU ID Number:

E-mail Address:

1. Are you a US citizen or Lawful Permanent Resident (Green Card holder)?
2. If you have a visa, what type of visa do you have?
3. When did you first enter the US on that specific visa?
4. What country did you reside in before coming to the US?
5. Did you file a tax return last year?
6. Did you earn any money in 2021?
7. If yes, who did you work for?
8. Did you live in, or earn income in a state other than Kansas in 2020?
9. If so, which state?
10. Did you receive an Economic Impact Payment(s) (EIP)?
11. If yes, how much did you receive in 2021?
12. Did you have a scholarship in 2021?
13. Are you married or do you have any dependents?
14. If yes, do they have Tax Identification Numbers (SSN, ITIN)?

Check appropriate box for each question in each section

Yes No Unsure Part I - Income - Last Year, Did You (or Your Spouse) Receive

1. (B) Wages or Salary? (Form W-2) If yes, how many jobs did you have last year?
2. (A) Tip Income?
3. (B) Scholarships? (Forms W-2, 1098-T)
4. (B) Interest/Dividends from: checking/savings accounts, bonds, CDs, brokerage?
(Forms 1099-INT, 1099-DIV)
5. (B) Refund of state/local income taxes? (Form 1099-G)
6. (B) Alimony income or separate maintenance payments?
7. (A) Self-Employment income? (Form 1099-MISC, 1099-NEC, cash, virtual currency,
or other property or services)
8. (A) Cash/check/virtual currency payments, or other property or services for any
work performed not reported on Forms W-2 or 1099?
9. (A) Income (or loss) from the sale or exchange of Stocks, Bonds, Virtual Currency
or Real Estate? (including your home) (Forms 1099-S, 1099-B)
10. (B) Disability income? (such as payments from insurance, or workers
compensation) (Forms 1099-R, W-2)

Check appropriate box for each question in each section

Yes No Unsure Part I - (continued)

11. (A) Retirement income or payments from Pensions, Annuities, and or IRA? (Form 1099-R)
12. (B) Unemployment Compensation? (Form 1099G)
13. (B) Social Security or Railroad Retirement Benefits? (Forms SSA-1099, RRB-1099)
14. (M) Income (or loss) from Rental Property?
15. (B) Other income? (gambling, lottery, prizes, awards, jury duty, virtual currency, Sch K-1, royalties, foreign income, etc.)

Yes No Unsure Part II - Expenses – Last Year, Did You (or Your Spouse) Pay

1. (B) Alimony or separate maintenance payments? If yes, do you have the recipient's SSN?
Yes No
2. Contributions or repayments to a retirement account?
IRA (A) Roth IRA (B) 401K (B) Other
3. (B) College or post secondary educational expenses for yourself, spouse or dependents? (Form 1098-T)
4. Any of the following?
(A) Medical & Dental (including insurance premiums)
(A) Mortgage Interest (Form 1098)
(A) Taxes (State, Real Estate, Personal Property, Sales)
(B) Charitable Contributions
5. (B) Child or dependent care expenses such as daycare?
6. (B) For supplies used as an eligible educator such as a teacher, teacher's aide, counselor, etc.?
7. (A) Expenses related to self-employment income or any other income you received?
8. (B) Student loan interest? (Form 1098-E)

Yes No Unsure Part III – Life Events – Last Year, Did You (or Your Spouse)

1. (A) Have a Health Savings Account? (Forms 5498-SA, 1099-SA, W-2 with code W in box 12)
2. (A) Have credit card, student loan or mortgage debt cancelled/forgiven by a lender or have a home foreclosure? (Forms 1099-C, 1099-A)
3. (A) Adopt a child?
4. (B) Have Earned Income Credit, Child Tax Credit or American Opportunity Credit disallowed in a prior year? If yes, for which tax year?
5. (A) Purchase and install energy-efficient home items? (such as windows, furnace, insulation, etc.)
6. (A) Receive the First Time Homebuyers Credit in 2008?
7. (B) Make estimated tax payments or apply last year's refund to this year's tax? If so how much?
8. (A) File a federal return last year containing a "capital loss carryover" on Form 1040 Schedule D?
9. (A) Have health coverage through the Marketplace (Exchange)? [Provide Form 1095-A]
10. (B) Receive an Economic Impact Payment (stimulus) in 2021?
11. (B) Receive Advanced Child Tax Credit payments?

IRS VITA Disclosures:

Publication 4836

Publication 4053

Publication 3676-A