

Gateway EITC Community Coalition / Alton Area Tax Project

Supplemental Intake Worksheet

Name(s): _____

We will prepare tax returns from information which you will furnish to us. It is your responsibility to provide all the information required for the preparation of complete and accurate returns. We will furnish you with worksheets as needed to guide you in gathering the necessary information. Your use of such forms will assist us in completing an accurate return. Because an audit is always possible, it is your responsibility to maintain adequate records to support the information on the return. In most cases, you should plan on keeping tax returns along with any supporting documents for a period of at least three years following the date you filed or the due date of your tax return, whichever is later.

County and state of residence on December 31? _____

Did your state of residence change last year? _____

If so, list other states and dates of residence on the back.

If married, did you live with your spouse during any part of the tax year? _____

Will you be claimed as a dependent by anyone else? _____

Did you pay property taxes for your primary residence? _____ If so, in which county did you pay the taxes? _____ Please provide tax statement if you have it.

Did you receive a 1098-T (Tuition Statement)? _____ If so, please ask a volunteer for and complete a 1098-T Intake Worksheet and provide the student's statement of account.

Do you have a 1099-NEC or have a cash business? _____

If so, please ask a volunteer for and complete a Schedule C (Self-Employment / Business) Intake Worksheet.

Did you make contributions to a college savings 529 plan? _____

Did you earn overtime in 2025? _____ If so, please ask a volunteer for and complete a Qualified Overtime Deduction Worksheet.

Illinois Residents: Qualified education expenses are tuition and book/lab fees paid to an Illinois school on behalf of your child who was a full-time K-12 student and under age 21. Do you have any such expenses over \$250? _____ If so, please ask a volunteer for and complete an IL Education Credit Worksheet.

Missouri Residents: Health insurance premiums and long-term care insurance premiums are deductible in MO. Amount of health insurance premiums: _____ Amount of long-term care insurance premiums: _____

If you want a refund to be direct deposited, **we prefer a copy of check (better accuracy)**. If not available, enter banking info here. Bank Name: _____ Use: Checking or Savings

Routing number: _____ Account number: _____