

5 DIGIT PIN NUMBER FOR TAXPAYER AND SPOUSE (NUMBERS NOT LETTERS)

INCOME

Indicate and provide tax documents for any of the following types of *income received* by you or your spouse in 2007:

- W-2 wage income. (Normal pay or bonuses, Line 7)
- Student loan repayment. (Line 7)
- Combat zone income. (Verify exclusion amount on W-2 and LES)
- 1099-INT interest income. (Line 8/Schedule B)
- 1099-DIV dividends. (Line 9/Schedule B)
- State/local income tax refund (if you itemized deductions in 2006). (Line 10)
- Alimony: Amount: \$ _____ (Line 11)
- Other. (Gambling, prizes, discharge of indebtedness, Line 21)
- 1099-DIV capital gains. (Line 13/Schedule D)
- 1099R pension or annuity. (Line 16)
- 1099G unemployment. (Line 19)
- 1099 SSA Social Security benefits. (Line 20)
- German *Kindergeld*. (Line 21)
- Alaska Permanent Fund Dividend. (Line 21, \$1,654 each)
- 1099R IRA distributions. (Line 15, 1099R)

CHECK IF ROLLED OVER INTO QUALIFYING ACCOUNT

DEDUCTIONS

Indicate *amounts paid* in 2007:

- | | | |
|---|----------|-------------|
| <input type="checkbox"/> Classroom expenses. (max of \$250 per K-12 teacher, counselor, principal, and aide)(Line 23) | YOU | YOUR SPOUSE |
| <input type="checkbox"/> Unreimbursed travel/lodging expenses to attend Guard/Reserve drills. (Line 24/Form 2106) | \$ _____ | \$ _____ |
| <input type="checkbox"/> Moving expenses. (Line 26/5903) | \$ _____ | \$ _____ |
| <input type="checkbox"/> Alimony: Recipient SSAN: _____ (Line 31) | \$ _____ | \$ _____ |
| <input type="checkbox"/> Traditional IRA account contributions. (Line 32/Form 8606) | \$ _____ | \$ _____ |
| <input type="checkbox"/> Roth IRA account contributions. (Line 53/Forms 8606 and 8880) | \$ _____ | \$ _____ |
| <input type="checkbox"/> Student loan interest. (Line 33) | \$ _____ | \$ _____ |

SCHEDULE A ITEMIZED DEDUCTIONS

- | | |
|---|----------|
| <input type="checkbox"/> Unreimbursed medical expenses/post-tax medical insurance payments. (Line 1) | \$ _____ |
| <input type="checkbox"/> U.S. state/local general sales taxes. (Line 5) | \$ _____ |
| <input type="checkbox"/> Real estate property tax on your primary home, not rental property. (Line 6) | \$ _____ |
| <input type="checkbox"/> Mortgage interest on your primary home, not rental property. (Line 10 or 11) | \$ _____ |
| <input type="checkbox"/> Mortgage insurance premiums. (Line 13) | \$ _____ |
| <input type="checkbox"/> Charitable contributions. (Line 16 or 17) | \$ _____ |
| <input type="checkbox"/> Other. (Casualty/theft; Miscellaneous - job expenses, tax prep fees, safe deposit box, gambling, Line 20-23) | \$ _____ |

Schedule A Itemized Deductions
You are permitted to take the higher of your itemized deductions or the standard deduction for your filing status.

CREDITS

Indicate *amounts paid* in 2007:

- Post-secondary tuition and fees. (Line 49/Form 8863; or Line 34)
- You \$ _____ Your spouse \$ _____
- A dependent (identify by name: _____) \$ _____
- For each post-secondary student claimed, indicate year in school (Freshman, Sophomore, or higher): You _____ Your spouse _____ A dependent _____
- Adoption finalized in 2007. (Line 54/Form 8839) \$ _____
- Estimated tax payments made for 2007. (Line 65) \$ _____
- Childcare. (Line 47/Form 2441)

CHILDCARE PROVIDER'S NAME AND ADDRESS	SSAN OR EIN (SETAF CDC EIN: 98-0121828)	AMOUNT

- Check here if you have *carry forward* adoption expenses or capital losses, and provide your 2006 return to your preparer.
- Check here if you or your spouse owes child support arrearages or a state or federal government agency debt. Discuss Form 8379.

ACKNOWLEDGMENT AND SIGNATURE. All information I/we provided on this Interview and Intake Sheet is correct. I/We understand that if the USASETAF Tax Center electronically files my/our return, my/our tax information will be retained at the Tax Center as required by the IRS.

TAXPAYER

SPOUSE