

## DETERMINATION OF NEED TO FILE

If you are unsure if you are required to file a return, fill out this form and return it to our office. We will review it and contact you to let you know if you should file a return.

Name \_\_\_\_\_ Address \_\_\_\_\_

Date: \_\_\_\_\_ Phone \_\_\_\_\_ E-mail \_\_\_\_\_

1. Are you married or single? \_\_\_\_\_

2. Your Age \_\_\_\_\_ Age Spouse \_\_\_\_\_

3. Are you a dependent of someone else? Yes / No

4. Income - use rough or rounded amounts

\*a) Wages = \$ \_\_\_\_\_ Federal tax withheld \_\_\_\_\_ State tax W/H \_\_\_\_\_

\*b) Interest income = \_\_\_\_\_

\*c) Dividend income = \_\_\_\_\_

\*d) Gross proceeds from sales of stocks = \_\_\_\_\_

And gross proceeds from sales of mutual funds = \_\_\_\_\_

\*e) Pension income (not including Social Security) = \_\_\_\_\_

IRA withdrawals = \_\_\_\_\_

Total Federal taxes withheld from pension/IRA = \_\_\_\_\_

\*f) Are you self-employed? \_\_\_\_\_ (if Yes, you should file)

\*g) Do you have rental property income? \_\_\_\_\_ (if Yes, you should file)

\*h) Do you receive alimony or other income other than Social Security? \$ \_\_\_\_\_

\*\*i) Gross amount of Social Security received (box 5) \_\_\_\_\_

5. Is there any other information that you think might affect your need to file a tax return?

\_\_\_\_\_  
\_\_\_\_\_

### FOR OFFICE USE ONLY

Add \*\*s = compare to chart \_\_\_\_\_ File HTC-60 ? \_\_\_\_\_

Need to file (Y / N) \_\_\_\_\_

Should file to get W/H back \_\_\_\_\_ or EIC Refund \_\_\_\_\_

Notes: