

**Telephone Excise Tax Refund
1040EZ-T INTAKE SHEET**

All information will be treated confidentially ♦ Return Preparation services are free.

- **Did you pay for long distance telephone service after February 28, 2003, and before, August 1, 2006?**
If no, **STOP** – You do not qualify for the Telephone Excise Tax refund.
- **Did you receive or have you requested a refund of the taxes you paid from your long distance service provider?**
If yes, **STOP** – You do not qualify for the Telephone Excise Tax refund.
- **Can you be claimed as a dependent on the income tax return of any other person for 2006?**
If yes, – You must file Form 8913 to claim the **Actual Taxes Paid**.
- **Have you or will you file a 2006 Federal Income Tax return?**
If yes, **STOP** – Do not complete the 1040EZ-T
- **Did you have wages or self-employed income in 2006?**
If yes, **STOP** – Do not complete the 1040EZ-T

PERSONAL INFORMATION

Your First Name **MI** **Last Name** - - **SSN**
or ITIN

Spouse's First Name **MI** **Last Name** - - **SSN**
or ITIN

Address: _____ Apt # _____ City _____ State _____ Zip _____

Phone numbers: Daytime _____ Evening _____ Cell _____

Personal and Dependent Information

List all persons for whom you provided support in 2006:

	Person 1	Person 2	Person 3	Person 4
Name				
Birth Date				
Relationship to you (son, daughter, parent, etc.)				
Number of months this person lived in your home during 2006				
Is this person a US Citizen, US Resident, or Resident of Mexico or Canada?				
Did you provide more than 50% support for this person in 2006?				
Did this person provide less than 50% of their own support in 2006?				
Was this person's income less than \$3,200 in 2006?				

***If you had Earned Income in 2006 you may be eligible for the
Earned Income Tax Credit (EITC) or other Credits***

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