CLIENT INSTRUCTIONS

In order to prepare your tax return, the IRS requires that we verify your identity with a government issued PHOTO ID and that we see social security cards for all those listed on the tax return. If you don’t have these documents, please speak with a volunteer.

PLEASE COMPLETE THE PAPERWORK IN YOUR FOLDER AS NEATLY AS POSSIBLE. Unreadable documents lead to errors that could slow down your refund.

INTAKE INTRVIEW FORM
Complete the first 3 pages of the intake form. DO NOT COMPLETE THE GREY AREAS. If you are unsure of the correct answer, please mark unsure and ask a volunteer for help.

CONSENT TO DISCLOSE (back of intake form)
Global Carry Forward of data allows TaxSlayer LLC, our tax software, to make your tax return information available to ANY volunteer site participating in the IRS’s VITA/TCE program that you select to prepare a tax return in the next filing season. This means you will be able to visit any volunteer site using TaxSlayer next year and have your tax return populate with your current year data, regardless of where you filed your tax return this year. You are not required to complete this form to engage our tax return preparation services.

CLIENT SURVEY
The client survey is used to obtain funding to finance this free service. As a nonprofit organization, GECC uses data to get funding. This data does not include personal information such as names and addresses. For example, counting the number of returns done for single women or people with disabilities can help us get support from funders who are interested in giving money to organizations that can prove they serve these specific groups.