



United Way of King County
Free Tax Preparation Campaign
uwkc.org/taxhelp
freetax@uwkc.org

Taxpayer Intake Form

The Taxpayer Intake Form is completely anonymous and strictly confidential. Personal data is not shared or sold to any third party.

CONSENT TO DISCLOSURE OF TAX RETURN INFORMATION

Your Name: (Print) _____

Tax Preparer: United Way of King County, Free Tax Preparation Campaign (VITA) _____

We care about your privacy.

WE AGREE that we will keep your electronic and paper tax returns secure.

WE AGREE that we will never share your name, social security number, employer or other personal information with anyone without your permission.

YOU AGREE that we can include non-identifying (i.e. gender, race, filing status, etc.) information from your tax return in anonymous, aggregate data reports:

- ✓ In marketing materials to promote the program
✓ In the submission of funding applications that support the program.

I/we the taxpayer(s) have read the above information and hereby CONSENT to the tax preparer's Disclosure of Tax Return Information for the purposes stated above.

Taxpayer Signature

Date

Spouse Signature (if married and filing together)

Date

If you do not agree, please check here: []

Federal law requires this consent form be provided to you. Unless authorized by law, we cannot disclose your tax return information to third parties for purposes other than the preparation and filing of your tax return without your consent.

You are not required to complete this form to engage our tax return preparation services. If we obtain your signature on this form by conditioning our tax return preparation services on your consent, your consent will not be valid.

If you believe your tax return information has been disclosed or used improperly in a manner unauthorized by law or without your permission, you may contact the Treasury Inspector General for Tax Administration (TIGTA) by telephone at 1-800-366-4484, or by e-mail at complaints@tigta.treas.gov.

1. Are you interested in any of the following services? (Choose all that apply)

- (A) Money to pay for groceries (B) Help paying utility bills (C) Help signing up for health insurance (D) Pulling your credit report (E) Help to reduce debt or improve credit (F) Help paying for the bus (G) In-person Financial Coaching

2. If you receive a refund, how would you like to receive it? (Please select one)

- (A) Receive a paper check (B) Deposit all in a Checking Account (C) Deposit all in a Savings Account (D) Split my refund between Checking & Savings Accounts (E) Put a portion of my refund in a Savings Bond

3. How often do you save or set money aside for the future? (Please select one)

- (A) Multiple times a month (B) Once a month (C) Once every couple of months (D) Once a year (E) Not currently saving, but interested (F) Not currently saving & not interested

4. What ethnicity do you consider yourself? (Please select one)

- (A) American Indian or Alaska Native (B) Asian / Asian-American (C) Black, African-American, or Other African (D) Hawaiian Native or Pacific Islander (E) Hispanic / Latino (F) White or Caucasian (G) Multi-racial (H) Other

5. How did you get your taxes done last year? (Please select one)

- (A) Here (B) Another free place like this (C) Family or friend (free) (D) Did my own (Paid software/website) (E) Did my own (Free software/website) (F) Paid someone (G) Did not file last year

6. Do you speak a language other than English?

- (A) Yes (B) No

7. What gender do you identify as?

- (A) Male (B) Female (C) Trans* (D) Other: _____

8. What is your current living arrangement? (Please select one)

- (A) Rent with myself or family (B) Own a home (C) Rent (with roommates) (D) Live in a dorm or other group setting (E) Currently homeless - living inside (F) Currently homeless - living outside

If you would like to receive a client feedback survey, information on public benefits, and job training resources write your email below:

E-mail: _____

Tax Preparers: Enter email address on the E-File page, under the "Tax Preparation and E-File Information" section.

Please review and complete all forms in this packet.

TAX PREPARATION DISCLAIMER

Thank you for choosing United Way of King County to help you file your income taxes this year. We operate under IRS guidelines and we have provided the following information to make sure every taxpayer knows the requirements for receiving tax preparation services.

- **You are responsible for all of the information listed on the completed tax return.** Please ask us questions if you have any concerns about your tax return or our process.
- **The following documents are required for us to prepare a tax return for you:**
 - Valid photo ID for the primary taxpayer (and spouse, if filing jointly)
 - Social Security cards/ITINS/ official documentation for all people you will be listing on the tax return. This includes: The taxpayer; The spouse (if filing jointly); Any dependents being claimed
- **We will ask for your consent to use and disclose data to help improve our program.**
 - The request is optional, the data is 100% anonymous, and United Way cannot and will not share personal data with any third parties. Your privacy is very important to us.
 - Your consent helps us improve our program: We share aggregate data (number of clients served, total refunds of clients served) to funders of this free service.
- **United Way ensures that your personal information will not be shared with any other parties and will be kept confidential.**

Please initial to acknowledge reading the above: _____

CONSENT TO GLOBAL CARRYFORWARD OF TAXPAYER DATA

Beginning with Filing Season 2018: Taxpayers using free tax preparation sites will need consent on whether they want their tax return information accessible to all sites participating in the VITA/TCE programs like United Way of King County's Free Tax Preparation Campaign.

By consenting to Global Carryforward of Taxpayer Data, you will be able to visit any volunteer program site in the next year (Filing Season 2019) and the free tax preparation site will be able to populate your return with general information from the prior year to aide in the tax preparation process. *Your answer will not affect your ability to participate in our tax return preparation services.*

I/we the taxpayer(s) have read the above information and hereby CONSENT to the Global Carryforward of Taxpayer Data in Filing Season 2019.

 Taxpayer Signature Date

 Spouse Signature (if married and filing together) Date

If you do not agree, please check here:

CONSENT TO USE OF TAX RETURN INFORMATION

Your Name: (Print) _____

Tax Preparer: United Way of King County, Free Tax Preparation Campaign (VITA)

We care about your privacy.

WE AGREE that we will keep your electronic and paper tax returns secure.

WE AGREE that we will never share your name, social security number, employer or other personal information with anyone without your permission.

YOU AGREE:

- ✓ That we can create a computer file with information from your tax return that will not include personal information such as your name and social security number.
- ✓ That we can use non-identifying information from your tax return to prepare reports and applications in support of the VITA program.
- ✓ That we can share information with you about community services that may be available to you.

I/we the taxpayer(s) have read the above information and hereby CONSENT to the tax preparer's Use of Tax Return Information for the purposes stated above.

 Taxpayer Signature Date

 Spouse Signature (if married and filing together) Date

If you do not agree, please check here:

Federal law requires this consent form be provided to you. Unless authorized by law, we cannot use your tax return information for purposes other than the preparation and filing of your tax return without your consent.

You are not required to complete this form to engage our tax return preparation services. If we obtain your signature on this form by conditioning our tax return preparation services on your consent, your consent will not be valid. Your consent is valid for the amount of time that you specify. If you do not specify the duration of your consent, your consent is valid for one year from the date of signature.

If you believe your tax return information has been disclosed or used improperly in a manner unauthorized by law or without your permission, you may contact the Treasury Inspector General for Tax Administration (TIGTA) by telephone at 1-800-366-4484, or by e-mail at complaints@tigta.treas.gov.