



Supplemental Information Sheet *version 10-15* Tax Year 20__

Taxpayer Social Security Number	Taxpayer Name Per Social Security Card	Are you a member of a Federally-recognized Indian tribe? Taxpayer <input type="checkbox"/> Yes <input type="checkbox"/> No Spouse <input type="checkbox"/> Yes <input type="checkbox"/> No	 
Spouse Social Security Number	Spouse Name Per Social Security Card		

Can you be claimed as a dependent on another persons return? Yes <input type="checkbox"/> No <input type="checkbox"/>	If YES <input type="checkbox"/> →	Name of Person Who Can Claim You _____	Social Security # (if known) _____	Relationship _____	Dependents do not take your own exemption
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Did you or your spouse

a. Receive the Alaska PFD? <input type="checkbox"/> Yes <input type="checkbox"/> No	c. Receive commercial fishing income? <input type="checkbox"/> Yes <input type="checkbox"/> No	e. Receive a Form 1099-MISC? <input type="checkbox"/> Yes <input type="checkbox"/> No
b. Have the Alaska PFD taken away? <input type="checkbox"/> Yes <input type="checkbox"/> No	d. Receive a native/corporation dividend? <input type="checkbox"/> Yes <input type="checkbox"/> No	If Yes, what was done to earn this income?

If Yes, please list the corporation: _____

To claim Head of Household filing status you must be either Single or Married Filing a Separate return and have lived apart from your spouse for the last six months of the year. You must have a qualifying dependent. Only one person in the home can be Head of Household. Ask your preparer for details.

If you are single or MFS and qualify, did you pay more than half the cost of keeping up the home for yourself and a qualifying dependent? Yes No

List all dependents. You may be able to claim a dependent as a qualifying child or as a qualifying relative. You may be able to claim a person that is not related to you if the person lived with you for the entire year and made less than the personal exemption amount and you provided for more than half of their support. You may be able to claim your child that is over 18. Make sure that the person that you claim as a dependent does not claim themselves on their own return. Ask your preparer and check out the dependency brochure.

Dependents Full Name <small>Must match Social Security card ----- (List youngest to oldest) ----- Do not enter your name or your spouses name below.</small>	Age	Birth Date <small>(mm/dd/yy)</small>	Social Security Number	Dependents Legal Relationship to You	Did you provide over 50% of the support for this dependent (Yes/No)	Number of months dependent lived with you last year	US Citizen, Resident of US, Canada or Mexico (Yes/No)	Full time student last year? (Yes/No)	Receive the AK PFD last year? (Yes/No) If garnished still yes.	Is the dependent a member of a Federally-recognized Indian Tribe (Yes/No)	Did this person have income other than the PFD, such as wages, self employment, Native/Corp dividends, Social Security, etc?

Were any of the dependents married as of December 31 st or can anyone else claim the dependents on their tax return? <input type="checkbox"/> Yes <input type="checkbox"/> No	Preparer Complete Grey Area
Does anyone else live in the home? <input type="checkbox"/> Yes <input type="checkbox"/> No	
If you are due a refund would you like direct deposit? <input type="checkbox"/> Yes <input type="checkbox"/> No	If yes, Bank _____ Account Number _____ Checking or Savings <input type="checkbox"/>

NOTES:

Virtual VITA/TCE Taxpayer Consent

This form is required whenever the taxpayer's tax return is completed and/or quality reviewed in a non-face-to-face environment. The site must explain to the taxpayer the process this site will use to prepare the taxpayer's return. If applicable, taxpayers must also be advised of all procedures and the associated risk if their data will be transferred from one site location to another site location (using process C or D).

Part I - To be completed by the VITA/TCE site: Main/Intake site name: Alaska Business Development Center

Site address: 840 K Street, Suite 202, Anchorage, Alaska 99501

Site identification number (SIDN): 64117282

Site Coordinator: Gary Bureson Site contact name: Gary Bureson

Site contact telephone number: 907-562-0335

This site is using the following Virtual VITA/TCE method(s) to prepare your tax return:

- A. Temporary VITA/TCE Contingency Plan:** This site uses a temporary drop off process when there are internet shut downs, software outages, or if sufficient certified preparers/quality reviewer(s) are not available on-site.
- B. Drop Off Site:** This site uses a drop off process which includes the site maintaining personal identifiable information (social security numbers, Form W-2, etc.) to prepare the tax return at the same site but at a later time. In this process, you will come back to the same site for the quality review and/or signing the completed tax return. The site will explain the method it will use to contact you if additional information is needed to prepare and/or quality review the tax return.
- C. Intake Site plus a Return Preparation and/or Quality Review Site:** This method includes the taxpayer leaving their personal identifiable information (social security numbers, Form W-2 and other documents) at the site in order to prepare and/or quality review the tax return at another location. In this process, the taxpayer's tax return information may be sent to another location for one or more of the following reasons; interviewing the taxpayer, preparing the tax return, or performing a quality review. The taxpayer will come back to the intake site for the quality review or to sign the completed tax return. If necessary, the site will explain the method they will use to contact the taxpayer if additional information is needed while preparing or quality reviewing the tax return. Your personal information will be transferred to the other location by: E-mail Fax Mail Other (explain)
- D. Other Approved Method (explain):** Your return will be prepared face to face at the travel site. Your prepared return and your information will be hand carried to the main site for quality review. The quality reviewer will contact you by telephone if necessary.

Site Contact Information (site information for the site that will receive the taxpayers information to prepare and/or quality review their tax return, if known)

Site address: 840 K Street, Suite 202, Anchorage, Alaska 99501

Site identification number (SIDN): 64117282

Site Coordinator: Gary Bureson Site contact name: Gary Bureson

Site contact telephone number: 907-562-0335

This form will be maintained at the site with all other required documents.**Part II: The Process: During the Intake Process you will need to:**

- Sign this Form 14446. • Complete the Form 13614-C, Intake/Interview & Quality Review Sheet.
- Have all required information/documentation necessary to prepare an accurate tax return.
 - o Picture Identification for yourself and spouse (if applicable).
 - o Forms W-2, 1099 and/or any other income documents to support Income, Expenses and Life Events listed on Form 13614-C.
 - o Social security cards (or other allowed social security verification documents) or Individual Tax Identification Numbers for you, your spouse and potential dependents (if applicable). o Any other documents required to prepare an accurate return.
- Participate in an Interview with the volunteer to address all of the information provided on Form 13614-C to ensure the preparer will have everything they need to prepare your tax return.

During the Return Preparation Process:

- If necessary, you may be contacted for additional information. If so, please follow the plans used to contact each other to ensure you are talking to the appropriate site contact and they are discussing your return information with you.
- If the preparer has everything required to prepare the return, you will not be contacted until the return is completed.

During the Quality Review Process you (and your spouse if applicable) will have to:

- Participate during the Quality Review process.
- Review your completed tax return to ensure the names, social security numbers, address, banking information, income, expenses are correct. This is important because you and your spouse (if applicable) are ultimately responsible for all of the information on the tax return.
- Sign Form 8879, *IRS e-file Signature Authorization*, after Quality Review is completed.

Part III: Taxpayer Consents: Request to Review your Tax Return for Accuracy:

- To ensure you are receiving quality services and an accurately prepared tax return at the volunteer site, IRS employees randomly select free tax preparation sites for review. If errors are identified, the site will make the necessary corrections. IRS does not keep any personal information from your reviewed tax return and this allows them to rate our VITA/TCE return preparation programs for accurately prepared tax returns. If you do not wish to have your return included as part of the review process, it will not affect the services provided to you at this site. If the site preparing this return is selected, do you consent to having your return reviewed for accuracy, by an IRS employee?

Yes No

Request to use the Virtual VITA/TCE Process:

- If you agree to have your tax return prepared and your tax documents handled in the above manner, your signature is required on this document. Signing this document means that you are agreeing to the procedures stated above for preparing a tax return for you. (If this is a Married Filing Joint return both spouses must sign and date this document.) If you chose not to sign this form, we may not be able to prepare your tax return today.

Printed name		Date	Printed name (Spouse if Married Filing Joint)		Date
Date of birth	Social Security/ITIN Last 4 digits-	Telephone number	Date of birth	Social Security/ITIN Last 4 digits-	Telephone number
Signature			Signature		
Email address			Email address		