

Intake/Interview Sheet for Kentucky

Were you a member of the KY National Guard on 12/31/2017?

Taxpayer	Yes	No
Spouse	Yes	No

Did you pay health insurance premiums with after tax dollars? If yes, enter the amount. \$ _____

Did you pay long-term care insurance premiums with after tax dollars? If yes, enter the amount \$ _____

Income- Last year, did you (or your spouse) receive:

Retirement income from the federal government, Commonwealth of KY, local KY government or U.S. Railroad?

Yes No Unsure

To be completed by Certified Volunteer Preparer if Yes to above, total retirement income exceeds \$41,110 and no % is given:

Name of Payer: _____
Date of retirement: _____
Total months of service, including purchased credits: _____
Months of service earned after 12/31/1997: _____

Life events- Last year, did you (or your spouse):

Purchase any items for storage, use or consumption in KY for which you did not pay at least 6% state sales tax?

Yes No Unsure Enter amt. \$ _____

Did you earn U. S. Government Interest. Amount \$ _____.

Did you earn tax-exempt interest from any state or municipality other than Kentucky? \$ Amount

Have a carry forward of KY education credits from 2013-2016? Yes No Unsure

If Yes, list year(s) and amount(s) _____

Pay qualified mortgage insurance premiums (VA, FHA, Rural Housing Authority or private mortgage insurance paid or accrued on a contract issued after December 31, 2006)?

Yes No Unsure

Engage in a business, profession, occupation or trade as a self-employed individual or independent contractor within any local government or municipality in the State of Kentucky?

Yes No Unsure

Make estimated KY tax payments or apply last year's refund to this year's tax?

Yes

No

Unsure

If Yes, how much?
