



Intake Sheet for Pennsylvania Taxpayers

Please answer the following questions that may affect the Pennsylvania return.

Name(s) _____

Municipality _____

County _____

School District _____

YES NO UNSURE

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Did you live at the same Pennsylvania address for the entire year?
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Did you pay school district, county or municipal property taxes in Pennsylvania last year?
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Did you have earned income and live or work in a Pennsylvania municipality or school district with a local earned income tax?
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Did you receive inheritances or gifts of money or life insurance proceeds or win any prizes? If so, please provide list with amount(s).
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Did you receive any interest or dividends from Pennsylvania state or local governments?
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Did you make any estimated tax payments to PA last year or did you designate a portion of last year's refund to be applied to this last year's taxes?
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Did you contribute to a college 529 plan? If so, please provide recipients SSN and amounts.

<p><u>Mail Payment and Voucher to:</u> PA Department of Revenue Payment Enclosed 1 Revenue Place Harrisburg PA 17129-0001</p>	<p><u>Where's My PA Refund?</u> Go to: http://tinyurl.com/ybzlpd9m Provide your SS# and the amount of your refund</p>
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Note to Tax-Aide Counselor: there are federal income items that may require intervention to properly flow to the PA income tax return. The PA Counselor will review those with you.