



MCAS YUMA TAX OFFICE INTAKE SHEET

NAME: \_\_\_\_\_  
LAST FIRST

PLEASE CIRCLE ONE IN EACH CATEGORY

GRADE OR SPONSOR'S GRADE: E1 E2 E3 E4 E5 E6 E7 E8 E9 W1 W2 W3 W4 O1 O2 O3 O4 O5 O6

UNIT: H&HS MAWTS MAG-13 MALS-13 BMC VMFA-121 VMA-211 VMA-214 VMA-311 VMA-513 MACS-1  
MWSS-371 VMFT-401 CLC-16 WTI OTHER: \_\_\_\_\_

BRANCH OR SPACE: USMC USN USAF USA USCG STATUS: ACTIVE DUTY DEPENDENT RETIRED RESERVIST

PLEASE CIRCLE **YES** OR **NO** TO THE FOLLOWING QUESTIONS:

- |   |     |    |
|---|-----|----|
| 1. DO YOU OWN <b>RENTAL PROPERTY</b> ?                                  | YES | NO |
| 2. DO YOU HAVE <b>COMPLICATED CAPITAL GAINS</b> ? (Mutual funds/stocks) | YES | NO |
| 3. DO YOU HAVE A <b>FORECLOSURE</b> or cancelled debt?                  | YES | NO |
| 4. DO YOU OWN A HOME ( and itemized deduction)                          | YES | NO |
| 5. DID YOU RECEIVE THE FIRST TIME HOME BUYER CREDIT IN 2008?            | YES | NO |
| 6. ARE YOU <b>SELF-EMPLOYED</b> ?                                       | YES | NO |

IF YOU ANSWERED YES TO ANY OF THE QUESTIONS ABOVE **STOP** AND SPEAK WITH THE TAX CLERK.

IF YOUR ANSWERS ARE ALL NO, CONTINUE TO ENTER ALL INFORMATION (PLEASE PRINT) AND RETURN SHEETS TO THE TAX CLERK.

IF YOU'RE FILING JOINTLY AND YOUR SPOUSE IS **NOT HERE**, YOU WILL USE A **POWER OF ATTORNEY**. (IF YOU HAVE A POWER OF ATTORNEY, WE NEED TO SEE YOUR **ORIGINAL POWER OF ATTORNEY**).

SSN: \_\_\_\_\_ TAXPAYER SSN: \_\_\_\_\_ SPOUSE

**BANK INFORMATION:** IF DIRECT DISPOSITION OF YOUR REFUND IS REQUESTED, PLEASE PROVIDE THE FOLLOWING INFORMATION, ALONG WITH PROOF OF YOUR ACCOUNT- BLANK CHECK, LES, LIST OF ACCOUNT INFO, ETC.

BANK **ROUTING** NUMBER: \_\_\_\_\_

YOUR **ACCOUNT** NUMBER: \_\_\_\_\_

CIRCLE ONE: CHECKING SAVINGS

WLS ✓