<table>
<thead>
<tr>
<th>Part IV - Expenses - Last Year Did You (or Your Spouse) Pay</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 (c) Wages or Salary (Form W-2) (If yes, how many jobs did you have last year?)</td>
<td>□</td>
<td>□</td>
</tr>
<tr>
<td>2 (d) Interest/Dividends (Form W-2, 1099-A, 1099-DIV)</td>
<td>□</td>
<td>□</td>
</tr>
<tr>
<td>3 (e) Self-Employment Income (Form 1099-MISC, 1099-NEC, 1099-NE, 1099-R)</td>
<td>□</td>
<td>□</td>
</tr>
<tr>
<td>4 (f) Gambling winnings, lottery prizes, awards, jury duty, virtual currency, etc.</td>
<td>□</td>
<td>□</td>
</tr>
<tr>
<td>5 (g) Social Security or Railroad Retirement Benefits (Form SSA-1099, RRB-1099)</td>
<td>□</td>
<td>□</td>
</tr>
<tr>
<td>6 (h) Charitable contributions (Form 1040/1040A)</td>
<td>□</td>
<td>□</td>
</tr>
<tr>
<td>7 (i) Personal, family, and living expenses (Form 1099-R, W-2)</td>
<td>□</td>
<td>□</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Part V - Liabilities - Last Year Did You (or Your Spouse) Pay</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>1a. (a) Paying off or reducing a debt or loan for personal, family, or living expenses</td>
<td>□</td>
<td>□</td>
</tr>
<tr>
<td>1b. (b) Paying off or reducing a debt or loan for personal, family, or living expenses</td>
<td>□</td>
<td>□</td>
</tr>
<tr>
<td>2. (c) Paying off or reducing a debt or loan for personal, family, or living expenses</td>
<td>□</td>
<td>□</td>
</tr>
<tr>
<td>3. (d) Paying off or reducing a debt or loan for personal, family, or living expenses</td>
<td>□</td>
<td>□</td>
</tr>
<tr>
<td>4. (e) Paying off or reducing a debt or loan for personal, family, or living expenses</td>
<td>□</td>
<td>□</td>
</tr>
<tr>
<td>5. (f) Paying off or reducing a debt or loan for personal, family, or living expenses</td>
<td>□</td>
<td>□</td>
</tr>
</tbody>
</table>

Check appropriate box for each question in each section.
Additional comments

14. Your spouse's ethnicity?
   
   No spouse
   
   13. Your ethnicity?
   
   No
   
   12. Your spouse's race?
   
   Not applicable
   
   11. Your race?
   
   Not applicable
   
   10. Are you or your spouse a veteran?
   
   Yes
   
   9. Do you or any member of your household have a disability?
   
   Yes
   
   8. Would you say you can read a newspaper or book in English?
   
   Yes
   
   7. Would you say you can carry on a conversation in English, both understanding and speaking?
   
   Yes
   
   6. Did you or your spouse own a home or farm?
   
   Yes
   
   5. Did you live in an area that was declared a Federal disaster area?
   
   Yes
   
   4. If you have a savings or checking account, do you trust your bank or credit union?
   
   Yes
   
   3. Check here if you are deaf or hard of hearing and if you wish to use the TTY number for the IRS.
   
   Yes
   
   2. Poverty Elimination Campaign Fund (if you check a box, your tax return will not include)
   
   Yes
   
   1. Provide an address (optional), (this may be used to notify us if our address should change)
   
   Yes
   
   To fill your return, be sure to answer the following questions.
Consent to Disclose Tax Return Information to VITA/TCE Tax Preparation Sites

Date: [Insert Date]

I, the taxpayer, have read the above information and hereby consent to the disclosure of tax return information described in the Global Carry Forward terms above and allow the tax return preparer to enter a PIN in the tax preparation software on my behalf to verify that I/we have consented to the terms of this disclosure.

Sincerely,

[Primary Taxpayer's Name]
[Secondary Taxpayer's Name if applicable]

Printed Name and signature

[Insert Date]

If you believe your tax return information has been disclosed or used improperly in a manner unauthorized by law or regulation, 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.gov.

[Secondary Taxpayer's Printed Name and signature]
[Insert Date]