

LOAN CENTRAL

Tax Preparation Questionnaire/Loan Application

Individual Taxpayer (claiming dependents)

Section 1 - COMPLETED BY LOAN CENTRAL	# W2s	# 1099s	#1098s	#1095s	#Other
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FC TAX, If NC, how did you hear about Loan Central? _____

Name and address of person that referred you? _____

YES NO Did you currently have a loan with us? If yes, do you have pretax loan? YES NO

YES NO Do you have W-2 forms from ALL employers you worked for last year?

YES NO Did you live with anyone else during 2017 that could claim YOU as a dependent (i.e. parent, grandparent, etc.)?

YES NO Is there another adult living in your home that is not filing a tax return? If yes, who? _____

YES NO Did you receive unemployment compensation last year? (1099G form required)

YES NO Are you Self Employed or have Farm Income, or were you issued a 1099 in 2017? (additional application required)

YES NO Did you or your dependents attend college OR pay college expenses/interest in 2017? (Education Credit Form/1098T)

Section 2 - PERSONAL INFORMATION

YES NO Are you currently serving in the military on Active Duty?

Marital Status on 12/31/17: Married, Date _____ Separated, Date _____ Divorced, Date _____ Widowed, Date _____

Primary Taxpayer First _____ MI _____ Last _____ Phone(____) _____

SS Number _____ - _____ - _____ Date of Birth ____/____/19 _____ Mother's Maiden Name _____

Mailing Address _____ Physical Address _____
(If Different- Cannot be a PO Box)

City _____ State _____ Zip _____ Email Address _____

Check the appropriate box for your address: Own Buying Live with parents Live with others Other

Alternate Phone (____) _____ *We may call if phone above is unreachable concerning your taxes.

Section 3 - DEPENDENT INFORMATION FOR WHOM YOU ARE CLAIMING

List ALL dependents* that you and/or your spouse have legal custody.

*To be **your dependent**, a person must be either your qualifying child or your qualifying relative. A person may be your qualifying child if they:

- Are your biological child, stepchild, foster child, brother, sister, stepbrother, stepsister, or a descendant of them. • Lived with you for more than half of the year.
- Did not provide more than half of his/her own support for the year. • Was under 19 on 12/31/17 (under 24 if full time student or permanently and totally disabled).

Dependents Name Excluding Yourself			Social Security	Date	Live with you	How many months	Relationship (son, daughter, parent
First	MI	Last	Card Number	of Birth	in 2017	in 2017 (1 to12)	foster child, niece, nephew, etc.)
Do NOT list yourself			- -	/ /	<input type="checkbox"/> No <input type="checkbox"/> Yes	# Months _____	
			- -	/ /	<input type="checkbox"/> No <input type="checkbox"/> Yes	# Months _____	
			- -	/ /	<input type="checkbox"/> No <input type="checkbox"/> Yes	# Months _____	
			- -	/ /	<input type="checkbox"/> No <input type="checkbox"/> Yes	# Months _____	
			- -	/ /	<input type="checkbox"/> No <input type="checkbox"/> Yes	# Months _____	
			- -	/ /	<input type="checkbox"/> No <input type="checkbox"/> Yes	# Months _____	

YES NO Did your dependants live with someone other than you at anytime in 2017? If yes, which dependant(s)? _____

Who did they live with? _____, Address _____

Relationship _____, How many months in 2017 did they live with them _____. From ____/____/____ to ____/____/____

YES NO Are any of your dependents permanently & totally disabled? Who? _____ (Provide Proof of Disability)

YES NO Dependent 19yrs or older? If yes, were they a full time student in 2017? YES NO School Name? _____

YES NO Do you have any children you are not claiming on this tax return? If yes, why? _____

YES NO Can anyone else try to claim any of the dependents listed (i.e., other parent, grandparent? If yes, who _____

YES NO Paid Alimony or Daycare Expenses? If yes, amount paid \$ _____ to whom: _____

Address _____ SS/EIN _____