

LINCOLN TAX PROFESSIONALS, LLC

5205 Chairman's Court, Suite 204
Frederick, MD 21703
(301) 371-5104 (888) 897-4080 (Fax)
office@lincolntax.com
www.lincolntax.com

Taxpayer's Name: _____
Tax Year: _____

DETERMINATION OF NEED TO FILE

If you are unsure if you are required to file a return, fill out this form and return it to our office. We will review it and contact you to let you know if you should file a return.

Name _____ Address _____

Date: _____ Phone _____ E-mail _____

1. Are you married or single? _____

2. Your age _____ Age of your spouse (if applicable) _____

3. Are you a dependent of someone else? Yes or No

4. Income - use rough or rounded amounts

*a) Wages = \$ _____ Federal tax withheld \$ _____ State tax withheld \$ _____

*b) Interest income = \$ _____

*c) Dividend income = \$ _____

*d) Gross proceeds from sales of stocks = \$ _____

And gross proceeds from sales of mutual funds = \$ _____

*e) Pension income (not including Social Security) = \$ _____

IRA withdrawals = \$ _____

Total Federal taxes withheld from pension/IRA = \$ _____

Total State taxes withheld from pension/IRA = \$ _____

*f) Are you self-employed? Yes or No (if Yes, you should file)

*g) Do you have rental property income? Yes or No (if Yes, you should file)

*h) Do you receive alimony or additional income other than Social Security? Yes or No

If Yes, how much \$ _____

*I) Amount of real estate taxes paid \$ _____

5. Is there any other information that you think might affect your need to file a tax return?

FOR OFFICE USE ONLY

Add *'s = compare to chart _____ File HTC-60? Yes or No

Need to file: Yes or No Reason: _____

Should file to get W/H back: Yes or No or EIC Refund _____

Notes: