

TCE Intake Form



Date _____

Taxpayer name _____

Spouse name _____

If you have not already done so, call 607-379-4045 and make an appointment to bring in your tax documents. Masks (optional) and hand sanitizer will be provided at all sites for use. Please also bring a working pen to sign forms at the appointment.

Please read the *What to Bring to Your Intake Appointment* sheet; it will help you collect all your needed documents.

Besides your tax documents and this sheet, complete the following forms and bring them with you:

- Intake/Interview & Quality Review Sheet (Yellow paper, Form 13614-C, 6 pages) You don't need to sign the last page until your appointment, we will explain what it says.
- NY Income Tax Worksheet (TP-301)

If you have any concerns about reading, writing, or communicating with us or completing your forms, please let us know so we can do what is needed to help you successfully complete this year's process and to make sure you understand your tax return.

The following information is just to help us accurately prepare your return:

Did you or your spouse own any digital currency (for example Bitcoin or Dogecoin) in 2025? Yes No

Did you or your spouse have any interest in an account in a foreign bank or financial institution in 2025? Yes No

Did you receive any income from or have an interest in a foreign business, retirement, or investment account in 2025? Or own or sell any property located in another country? Yes No

If yes, please describe _____

Are you and your spouse and all dependents US citizens or green card holders? Yes No

If not, when did you and/or your spouse first enter the US? _____

Are you here under a student or work Visa? Yes No