

# Indiana Intake/Interview Form

*All questions apply to the tax year for which you are currently filing.*

Taxpayer Last Name: \_\_\_\_\_

## Residency Information (If filing Jointly Spouse/Partner Information is required)

**NOTE: If you did not live in Indiana on January 1, 2024 complete the part-year Information on the reverse side.**

1. Did you live in Indiana all 12 months last year? Yes ☐ No ☐

On **January 1st** of last year:

a. In which Indiana County did you live?

Taxpayer: \_\_\_\_\_

Spouse: \_\_\_\_\_

b. In which Indiana County did you work?

Taxpayer: \_\_\_\_\_

Spouse: \_\_\_\_\_

## Deduction and Credit Information

2. Did you pay rent for your home or trailer lot? (If YES enter information on reverse side.) Yes ☐ No ☐

3. Did you pay property tax for your home? (If YES enter information on reverse side.) Yes ☐ No ☐

4. Did you receive military, reserve, or National Guard pay or other benefits? Yes ☐ No ☐

a. If YES, did you serve on active duty? Yes ☐ No ☐

b. If YES, are you a surviving spouse and received military retirement pay during 1/1/2024-12/31/2024? Yes ☐ No ☐

5. Did you have any out of state income from working? Yes ☐ No ☐

6. Did you receive a Form IT-40QEC (Enterprise Zone Deduction) from your employer? Yes ☐ No ☐

7. Are you receiving an annuity for an Indiana Lottery for held before 2/1/2002? Yes ☐ No ☐

8. Did you pay premiums for a Long-Term Care Policy? Yes ☐ No ☐

9. Did one or more of your children attend a non-public school?  
(Includes K-12 homeschooling, parochial schools, and other private schools.) Yes ☐ No ☐

10. Did you donate money or property to an Indiana college? Yes ☐ No ☐

11. Did you donate to any other scholarship fund(s)? Yes ☐ No ☐

12. Did you contribute to an Indiana College Choice 529 Education Savings Plan? Yes ☐ No ☐

## Other Tax, Payment and Refund Information

13. Did you make any out-of-state or mail order purchases where tax was not assessed? Yes ☐ No ☐

14. Did you make quarterly Indiana estimated tax payments, or apply a refund received last year to this year? Yes ☐ No ☐

15. Would you like to make a donation from your refund to the Indiana Nongame Wildlife Fund, Military Family Relief Fund, or the Public K-12 Education Fund? Yes ☐ No ☐

16. Would you like your refund direct deposited? Yes ☐ No ☐

## Rent and Property Tax Information

If you rented, how much did you pay per month for your Indiana home? \$ \_\_\_\_\_

For how many months did you pay rent? \_\_\_\_\_

Provide Landlord Information

Name: \_\_\_\_\_

Street: \_\_\_\_\_

\_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

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If you paid property tax how many months did you live there? \_\_\_\_\_ Tax Amount: \$ \_\_\_\_\_

If the address is different from the address on the front page of the return enter address below:

Street: \_\_\_\_\_

\_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

## Only If Part Year Resident Enter the Information Below

When did you move to Indiana? \_\_\_\_\_, 2024

Where did you live on January 1, 2024?

Street Address: \_\_\_\_\_

\_\_\_\_\_

State \_\_\_\_\_ Zip Code: \_\_\_\_\_

If you lived in an additional state enter the address and dates:

From \_\_\_\_\_, 2024 through \_\_\_\_\_, 2024

Street Address: \_\_\_\_\_

\_\_\_\_\_

State \_\_\_\_\_ Zip Code: \_\_\_\_\_

**Have you filed or do you wish to file a tax return(s) for the other states in which you resided?**

List of other states to be filed \_\_\_\_\_