Client Tax Questionnaire

The return-prep interview for an individual client. Life changes first, because they decide what else to ask.

ORGANIZATION

DATE

Life changes this year

DID ANY OF THESE HAPPEN THIS YEAR?

- [ ] Married, divorced or separated
- [ ] A new child or other dependent
- [ ] Moved home, or moved to another state
- [ ] New job, lost a job or started a business
- [ ] Bought or sold a home
- [ ] None of these

DATES AND DETAILS FOR ANYTHING YOU TICKED

Your household

HOW DID YOU FILE LAST YEAR?

- [ ] Single
- [ ] Married filing jointly
- [ ] Married filing separately
- [ ] Head of household
- [ ] Qualifying surviving spouse

EACH DEPENDENT: NAME, DATE OF BIRTH, RELATIONSHIP TO YOU AND MONTHS THEY LIVED WITH YOU THIS YEAR

Did you pay more than half the cost of keeping up your home this year?

- [ ] Yes
- [ ] No
- [ ] Not sure

EVERY STATE YOU LIVED OR WORKED IN THIS YEAR

Income

WHICH KINDS OF INCOME DID YOU HAVE?

- [ ] Wages from an employer
- [ ] Self-employment or contract work
- [ ] Interest, dividends or investment sales
- [ ] Rent from a property
- [ ] Retirement payments or Social Security
- [ ] Something else

INCOME PAID IN CASH, THROUGH AN APP, OR THAT YOU ARE UNSURE ABOUT

Credits and deductions

Did you or a dependent pay college tuition this year?

- [ ] Yes
- [ ] No

Did you pay for child or dependent care so you could work?

- [ ] Yes
- [ ] No

CHARITABLE GIFTS: ROUGH TOTAL, AND TO WHOM

ESTIMATED TAX PAYMENTS YOU MADE: DATES AND AMOUNTS

Follow-up and authorization

WHO PREPARED LAST YEAR'S RETURN?

Did the IRS or a state tax agency write to you this year?

☐ Yes ☐ No

Can we ask the IRS for your tax records using Form 8821?

☐ Yes, send me the form to sign ☐ Not now

WHO ANSWERED THESE QUESTIONS

DATE ANSWERED

BEST NUMBER FOR FOLLOW-UP QUESTIONS