**YOUR BUSINESS INFORMATION HERE:**

**BUSINESS NAME/ADDRESS/PHONE NUMBER/WEBSITE**

**Tax Return Client Questionnaire Checklist**

**Clients: Provide any information on a separate sheet of paper, email, or call us.**

|  |  |  |  |
| --- | --- | --- | --- |
| **Category** | **Question** | **Yes/No** | **Additional Information (if applicable)** |
| **Personal Information** | Have you or your spouse changed your name? | Yes / No | If yes, provide new legal names. |
|  | Are you or your spouse a U.S. citizen or resident alien? | Yes / No |  |
|  | Do you have any dependents? | Yes / No | If yes, provide names, SSNs, and dates of birth. |
|  | Are you married, single, or divorced? | Yes / No | If married, provide spouse’s information. |
| **Income Information** | Did you receive wages from an employer? | Yes / No | If yes, attach W-2 forms. |
|  | Did you receive self-employment or freelance income? | Yes / No | If yes, attach 1099-NEC or 1099-K forms. |
|  | Did you receive interest, dividends, or other investment income? | Yes / No | If yes, attach 1099-INT, 1099-DIV forms. |
|  | Did you sell any stocks, bonds, crypto, or property? | Yes / No | If yes, provide sale details and forms (e.g., 1099-B). |
|  | Did you receive unemployment, Social Security, or other government benefits? | Yes / No | If yes, provide documentation (1099-G, SSA-1099). |
|  | Did you receive any gambling winnings? | Yes / No | If yes, provide the amount and source. |
| **Deductions and Adjustments** | Did you pay tuition or student loan interest this year? | Yes / No | If yes, attach Form 1098-T or 1098-E. |
|  | Did you pay for significant medical or dental expenses? | Yes / No | If yes, provide receipts or insurance records. |
|  | Did you make any charitable donations? | Yes / No | If yes, provide receipts or documentation. |
|  | Did you pay property taxes or mortgage interest? | Yes / No | If yes, provide the amounts. |
|  | Did you contribute to a retirement account (IRA, 401(k), etc.)? | Yes / No | If yes, provide contribution statements. |
| **Life Events** | Did you get married, divorced, or separated this year? | Yes / No | If yes, provide the date and details. |
|  | Did you have a child, adopt, or become a guardian? | Yes / No | If yes, provide child’s name, date of birth, and SSN. |
|  | Did you move for work or personal reasons? | Yes / No | If yes, provide moving details (dates, expenses). |
|  | Did you purchase, sell, or refinance a home? | Yes / No | If yes, provide details and closing documents. |
|  | Did you experience any other significant life changes? | Yes / No | If yes, please describe. |
| **Tax Credits** | Are you eligible for the Earned Income Tax Credit (EITC)? | Yes / No |  |
|  | Did you make energy-efficient home improvements or purchase an electric vehicle? | Yes / No | If yes, provide receipts and purchase details. |
|  | Do you have child or dependent care expenses? | Yes / No | If yes, provide details and amounts. |
| **Miscellaneous** | Do you have any foreign bank accounts or assets? | Yes / No | If yes, provide details. |
|  | Were you a victim of identity theft or fraud? | Yes / No | If yes, provide details or documentation. |
| **Documentation** | Do you have all your tax documents (W-2, 1099, receipts, etc.)? | Yes / No | If no, specify what is missing. |
|  | Do you have a copy of your previous year’s tax return for reference? | Yes / No | If no, provide reason. |

**Additional Notes or Questions**

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