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Client Tax Intake

Please type your answers, save the file, and return it through your preparer's secure upload link.

Client name: Tax year:

Your preparer will review your answers and request any missing information.
Do not enter full Social Security numbers, bank account numbers, or passwords on this form.
Provide identity documents and tax forms through TaxesToGo or your preparer's secure portal.

1 | Your information

Full legal name and preferred name

Phone number and email

Mailing address, city, state, ZIP

Spouse name (if applicable) / Preferred language

Assigned preparer or tax office / New or returning client?

2 | What help do you need?

Tax year(s) / Original return, amendment, prior-year filing, or IRS notice help?

Did your address, phone, or legal name change?	☐ Yes	☐ No	☐ Not sure
Did you live or work outside your home state?	☐ Yes	☐ No	☐ Not sure
Do you or your spouse have an IRS identity protection PIN?	☐ Yes	☐ No	☐ Not sure

If yes or not sure, explain here. Send the actual IP PIN only through the secure portal.

Details (include other states and approximate dates)

Complete every page. Use Not sure when you need help. Add a page for extra details.

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Household & Filing Status

Answer based on the tax year you are filing. Your preparer will determine the correct filing status.

Client name: Tax year:

3 | Your household

Date of birth / Spouse date of birth (if applicable)

On December 31, were you single, married, divorced, separated, or widowed?

Marriage, divorce, separation, or spouse death date (if applicable)

Have you claimed or presented yourselves as married without a ceremony?	☐ Yes	☐ No	☐ Not sure
Did you and your spouse live apart during the year?	☐ Yes	☐ No	☐ Not sure
Can anyone else claim you or your spouse as a dependent?	☐ Yes	☐ No	☐ Not sure
Were you or your spouse a full-time student?	☐ Yes	☐ No	☐ Not sure
Were you or your spouse blind or permanently disabled?	☐ Yes	☐ No	☐ Not sure

Who lived in your home? Include names, relationships, and months there.

If living apart: dates apart and who lived with each person.

4 | Household costs

About how much did it cost to run the home for the year? Who paid what?

Include rent, mortgage interest, property taxes, utilities, repairs, home insurance, and food at home.
List help from a partner, relatives, or assistance programs. Estimates may need supporting records.

Anything else about your household your preparer should know?

Complete every page. Use Not sure when you need help. Add a page for extra details.

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Children & Other Dependents

List everyone you want your preparer to review. Being listed does not mean a person qualifies.

Client name: Tax year:

5 | Tell us about each person

PERSON 1

Name / date of birth / relationship to you (do not enter SSN)

Nights with you / nights elsewhere / other parent or caregiver name

Student or disability status / own income / who paid their living costs?

PERSON 2

Name / date of birth / relationship to you (do not enter SSN)

Nights with you / nights elsewhere / other parent or caregiver name

Student or disability status / own income / who paid their living costs?

PERSON 3

Name / date of birth / relationship to you (do not enter SSN)

Nights with you / nights elsewhere / other parent or caregiver name

Student or disability status / own income / who paid their living costs?

6 | Other possible claims

Could another person claim any of the people listed?	☐ Yes	☐ No	☐ Not sure
Is there a custody agreement or a signed Form 8332?	☐ Yes	☐ No	☐ Not sure
Did anyone listed marry, attend college, or live away temporarily?	☐ Yes	☐ No	☐ Not sure

Explain yes/not sure answers. Add another page for more dependents.

Complete every page. Use Not sure when you need help. Add a page for extra details.

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Income & Business

Check one answer per question. Report all income, including cash, even if no tax form was received.

Client name: Tax year:

7 | During the tax year, did you or your spouse receive...

Wages, tips, bonuses, or overtime from a job?	☐ Yes	☐ No	☐ Not sure
Cash jobs, gig work, self-employment, or business income?	☐ Yes	☐ No	☐ Not sure
Interest, dividends, investments, or digital-asset activity?	☐ Yes	☐ No	☐ Not sure
Retirement, pension, IRA, or Social Security payments?	☐ Yes	☐ No	☐ Not sure
Unemployment payments?	☐ Yes	☐ No	☐ Not sure
Rental, farm, royalty, or partnership/S-corporation income?	☐ Yes	☐ No	☐ Not sure
Income earned outside the United States or foreign accounts?	☐ Yes	☐ No	☐ Not sure
Gambling, prizes, debt cancellation, or other income?	☐ Yes	☐ No	☐ Not sure
Property, home, investment, or business-asset sales?	☐ Yes	☐ No	☐ Not sure

List all jobs, businesses, income sources, and documents you have or are missing.

8 | If you have a business, gig work, rentals, or a farm

Business name / type of work / start date / business ownership

How do you track income and expenses? Any cash or payment-app sales?

Did you buy equipment, use a vehicle, or use a home office?	☐ Yes	☐ No	☐ Not sure

Upload income/expense records, asset receipts, and vehicle logs securely.
Your preparer may request a separate business, rental, farm, or vehicle questionnaire.

Complete every page. Use Not sure when you need help. Add a page for extra details.

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Expenses, Credits & Changes

These questions identify topics to review. They do not establish eligibility for a deduction or credit.

Client name: _____ Tax year: _____

9 | Did you or anyone in your household...

Pay childcare so you (and spouse, if applicable) could work?	☐ Yes	☐ No	☐ Not sure
Pay college tuition or receive scholarships?	☐ Yes	☐ No	☐ Not sure
Pay student-loan interest?	☐ Yes	☐ No	☐ Not sure
Have Marketplace health coverage or receive Form 1095-A?	☐ Yes	☐ No	☐ Not sure
Contribute to or withdraw from an HSA or retirement account?	☐ Yes	☐ No	☐ Not sure
Pay mortgage interest, property taxes, or charitable donations?	☐ Yes	☐ No	☐ Not sure
Have significant medical or dental expenses?	☐ Yes	☐ No	☐ Not sure
Buy a vehicle or make home energy improvements?	☐ Yes	☐ No	☐ Not sure
Receive adoption-related payments or pay adoption expenses?	☐ Yes	☐ No	☐ Not sure
Make estimated tax payments or apply last year's refund?	☐ Yes	☐ No	☐ Not sure
Receive an IRS/state notice or have a credit denied before?	☐ Yes	☐ No	☐ Not sure
Pay qualifying alimony, educator costs, or job-related union dues?	☐ Yes	☐ No	☐ Not sure

Explain yes/not sure answers. Include dates, amounts, people involved, and forms.

Other changes or questions (moving, new baby, death, disaster, etc.)

Upload supporting forms and receipts securely. Do not send sensitive documents in a group chat.
Some benefits depend on the tax year, purchase dates, income, and other eligibility requirements.

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Documents & Confirmation

Finish this checklist, save your completed PDF, and upload it to your preparer securely.

Client name: Tax year:

10 | Documents to gather

Provide the items that apply to you through TaxesToGo or your preparer's secure portal:
- Taxpayer/spouse identification and required taxpayer/dependent identity records.
- Prior-year tax return and IRS IP PIN notices, if applicable.
- All W-2s, 1099s, K-1s, income statements, and records of cash income.
- Business/rental/farm income and expense records; asset and vehicle records.
- Form 1095-A, childcare provider information, education forms and tuition records.
- Relevant deduction receipts, estimated-payment records, and IRS/state notices.
- Residency/support records and custody/release documents when applicable.

What documents are still missing?

What questions would you like your preparer to discuss with you?

11 | Confirm your information

I have answered to the best of my knowledge and will provide complete income information.
I understand my preparer may ask follow-up questions or request additional records.
My preparer will review filing status, dependents, credits, and deductions before filing.
This questionnaire does not authorize e-filing, represent a tax return, or replace an engagement agreement, required tax signatures, or separate consent forms.

Client typed name / date (acknowledgment only)

Spouse typed name / date, if applicable (acknowledgment only)

How to return your questionnaire

1. Open this PDF in a PDF app that supports fillable forms (such as Adobe Acrobat Reader).
2. Complete every page. Save the file, close it, and reopen it to confirm your answers remain.
3. Upload the saved file through your preparer's TaxesToGo app or secure portal.
4. Tell your preparer when it is uploaded. If uploads are unavailable, request a secure alternative.

Please do not send completed intake forms to a classroom or training group.