



Robert J. Klein, CPA
Tax & Financial Consulting

Client Interview Form

Please complete this form before your tax return preparation for calendar year 2025.

1. Personal Information

Name		Soc. Sec. No.	D.O.B. (MM/DD/YYYY)	Occupation	Phone Number
Taxpayer					
Spouse					
Email Address		City		State ZIP	
Street Address					

<u>Taxpayer</u>		<u>Spouse</u>		<u>Marital Status</u>		<u>Will File Jointly?</u>	
Blind?	Yes	No	Yes	No	Married	Yes	No
Disabled?	Yes	No	Yes	No	Single		
Widow(er), Date of death : _____							

2. Dependents (Children and Others)

Name (First, Last)	Relationship	D.O.B. (MM/DD/YYYY)	Soc. Sec. No.	Months Lived with you	Disabled? (Yes/No)	Full Time Student? (Yes/No)	Dependent's Gross Income

3. Interview Questions

Please answer the following questions:

1. Are you self-employed or do you receive hobby income?	Yes	No	7. Did you go through bankruptcy proceedings?	Yes	No
2. Did you receive income from raising animals or crops?	Yes	No	8. Did you receive unemployment compensation?	Yes	No
3. Did you receive rent from real estate or other property?	Yes	No	9. Did you pay interest on a student loan for yourself, spouse, or dependent during the year?	Yes	No
4. Did you receive income from gravel, timber, minerals, oil, gas, copyrights, or patents?	Yes	No	10. Did you pay expenses for yourself, spouse or dependent to attend school beyond high school?	Yes	No
5. Did you withdraw or write checks from a mutual fund?	Yes	No	11. Did you have any children under the age of 19, or 19-23 year-old students with unearned income of more than \$1,100?	Yes	No
6. Do you have a foreign bank account, trust, or business?	Yes	No	12. Did you receive any payments in cash for services rendered?	Yes	No



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13. Do you provide a home for or help support anyone not listed as a dependent?	Yes	No	21. Did you receive any Forms 1099-K from third-party networks (eBay, PayPal, Venmo, etc.)?	Yes	No
14. Did you receive any correspondence from the IRS or State Department of Taxation?	Yes	No	22. Have you or your spouse been a victim of identity theft and given an ID theft protection pin by the IRS? If yes, please provide us with the 6 digit PIN.	Yes	No
15. Were there any births, deaths, marriages, divorces or adoptions in your immediate family?	Yes	No			
16. Did you give a gift of more than \$19,000 to one or more people?	Yes	No	Taxpayer IRS PIN:		Spouse IRS PIN:
17. Did you have any debts canceled, forgiven, or refinanced?	Yes	No	23. Did you purchase a new alternative technology vehicle or electric vehicle?	Yes	No
18. Did you own \$50,000 or more in foreign financial assets?	Yes	No	24. Did you install any energy property to your residence such as solar water heaters, generators or fuel cells, or energy efficient improvements such as exterior doors or windows, insulation, heat pumps, furnaces, central air conditioners, water heaters, etc.?	Yes	No
19. Did you finance the purchase of a new vehicle in 2025?	Yes	No			
20. Did you receive the NYS inflation check?	Yes	No			

4. Additional Information

NYS now requires Taxpayer Driver's License information when E-filing to protect against Identity theft. Please provide us with the following information (or a photocopy of the front and back of your license) below:

License Number:

Issuing State:

Issue Date:

Expiration Date:

Document Number:

Please describe any unusual circumstances or events that you feel may affect your tax return.

Taxpayer Signature

Date