Robert J. Klein, CPA

Tax & Financial Consulting

Client Interview Form

Please complete this form before your tax return preparation for calendar year 2026.

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			

	Taxpayer	Spouse
Blind?	○ Yes ○ No	○ Yes ○ No
Disabled?	○ Yes ○ No	○ Yes ○ No

Marital Status
- ○ Married
- ○ Single
- ○ Widow(er), Date of death : _____

Will File Jointly? ○ Yes ○ No

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
2. Did you receive income from raising animals or crops? ○ Yes ○ No
3. Did you receive rent from real estate or other property? ○ Yes ○ No
4. Did you receive income from gravel, timber, minerals, oil, gas, copyrights, or patents? ○ Yes ○ No
5. Did you withdraw or write checks from a mutual fund? ○ Yes ○ No
6. Do you have a foreign bank account, trust, or business? ○ Yes ○ No
7. Did you go through bankruptcy proceedings? ○ Yes ○ No
8. Did you receive unemployment compensation? ○ Yes ○ No
9. Did you pay interest on a student loan for yourself, spouse, or dependent during the year? ○ Yes ○ No
10. Did you pay expenses for yourself, spouse or dependent to attend school beyond high school? ○ 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
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

14. Did you receive any correspondence from the IRS or State Department of Taxation? ○ 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

17. Did you have any debts canceled, forgiven, or refinanced? ○ Yes ○ No

18. Did you own $50,000 or more in foreign financial assets? ○ 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

21. Did you receive any Forms 1099-K from third-party networks (eBay, PayPal, Venmo, etc.)? ○ 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

Taxpayer IRS PIN: _____

Spouse IRS PIN: _____

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**

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