



Robert J. Klein, CPA
Tax & Financial Consulting

Client Interview

Please complete this form before your tax return preparation for calendar year 2021.

1. Personal Information

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

<u>Name (First, Last)</u>	<u>Relationship</u>	<u>D.O.B.</u>	<u>Soc. Sec. No.</u>	<u>Months Lived with you</u>	<u>Disabled</u>	<u>Full Time Student</u>	<u>Dependent's Gross Income</u>

3. Basic Questions

Please answer the following questions:

- | | | | | | |
|---|------|----|--|-----|----|
| 1. Are you self-employed or do you receive hobby income? | Yes* | No | 6. Did you go through bankruptcy proceedings? | Yes | No |
| 2. Did you receive income from raising animals or crops? | Yes* | No | 7. Did you receive the third round Economic Impact Payment, otherwise known as the "Stimulus check?" Please list amount received. | Yes | No |
| 3. Did you receive rent from real estate or other property? | Yes* | No | 8. Did you receive unemployment compensation? | Yes | No |
| 4. Did you receive income from gravel, timber, minerals, oil, gas, copyrights, patents? | Yes* | No | 9. Did you pay interest on a student loan for yourself, spouse, or dependent during the year? | Yes | No |
| 5. Did you withdraw or write checks from a mutual fund? | Yes | No | 10. Did you pay expenses for yourself, spouse or dependent to attend school beyond high school? | Yes | No |



Robert J. Klein, CPA
Tax & Financial Consulting

- 11. Do you have a foreign bank account, trust, or business?
12. Do you provide a home for or help support anyone not listed as a dependent?
13. Did you receive any correspondence from the IRS or State Department of Taxation?
14. Were there any births, deaths, marriages, divorces or adoptions in your immediate family?
15. Did you give a gift of more than \$15,000 to one or more people?
16. Did you have any debts cancelled, forgiven, or refinanced?
17. Did you receive any Advanced Child Tax Credit payments?
18. Did you have any children under the age of 19 or 19-23 year old students with unearned income of more than \$1,100?
19. Did you receive any payments in cash for services rendered?
20. Did you own \$50,000 or more in foreign financial assets?
21. Have you or your spouse been a victim of identity theft and given an ID theft protection pin by the IRS?
22. Did you purchase a new alternative technology vehicle or electric vehicle?
23. 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 or water heaters?

*Contact us for further instructions

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.

Blank lines for describing unusual circumstances or events.

Taxpayer Signature

Date