

Robert J. Klein, CPA

Tax & Financial Consulting

Client Interview Form

Please complete this form before your tax return preparation for calendar year 2023.

1.Personal Information									
Name					Soc. Sec. No.	D.O.B. (MM/DD/YYYY)	Occupation	Phone N	Number
Гахрауег									
Spouse			j s						
Email Address					City State		State	ZIP	
Street Address									
Blind? Disabled?	Taxpayer Yes No Yes No		Spouse es es	e No No		<u>M</u>	Married Single Widow(er), Date of death:	Will File Yes	e Jointly? No
2.Dependents (Children and Oth	ners)		y	7,2000					
Name (First, Last)	Relationship (N	D.O.B. IM/DD/YYYY)	Soc.	Sec. No.	Months Lived with you	Disabled? (Yes/No)	Full Time Student? (Yes/No)	Depender Inco	
3.Interview Questions									
Please answer the follow	ing questions:								
1. Are you self-employed or do you receive hobby income?		e hobby	Yes	No	7. Did you go through bankruptcy proceedings? 8. Did you receive unemployment compensation? 9. Did you pay interest on a student loan for yourself, spouse, or dependent during the year? 10. Did you pay expenses for yourself, spouse or dependent to attend school beyond high school?			Yes	No
2. Did you receive income from raising animals or crops?		mals or	Yes	No				Yes	No No
3. Did you receive rent from real estate or other property?		other	Yes	No					
4. Did you receive income from gravel, timber, minerals, oil, gas, copyrights, or patents?		nber,	Yes	No				Yes	No
5. Did you withdraw or write checks from a mutual fund?		a	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?		st, or	Yes	No	12. Did you receive any payments in cash for services rendered?			Yes	No



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third-party networks (eBay, PayPal, Venmo, etc.)? 14. Did you receive any correspondence from the IRS or State Department of Taxation? 15. Were there any births, deaths, marriages, divorces or adoptions in your immediate family? 16. Did you give a gift of more than \$17,000 to one or more people? 17. Did you have any debts canceled, forgiven, or refinanced? Yes No 20. 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. Taxpayer IRS PIN: Spouse IRS PIN 21. Did you purchase a new alternative technology of vehicle or electric vehicle?	12. D					
RS or State Department of Taxation? 5. Were there any births, deaths, marriages, worces or adoptions in your immediate family? 6. Did you give a gift of more than \$17,000 to one more people? 7. Did you have any debts canceled, forgiven, or financed? 8. Did you own \$50,000 or more in foreign nancial assets? 8. Did you own \$50,000 or more in foreign nancial assets? 8. Did you own \$50,000 or more in foreign nancial family. 8. Did you own \$50,000 or more in foreign nancial family. 8. Did you own \$50,000 or more in foreign nancial family. 8. Did you own \$50,000 or more in foreign nancial family. 8. Did you own \$50,000 or more in foreign nancial family. 8. Did you own \$50,000 or more in foreign nancial family. 8. Did you own \$50,000 or more in foreign nancial family. 8. Did you own \$50,000 or more in foreign nancial family. 8. Did you own \$50,000 or more in foreign nancial family. 9. No 12. Did you purchase a new alternative technology. 13. Yes No 14. Ves No 15. Ves No 16. Did you purchase a new alternative technology. 16. Did you purchase a new alternative technology. 17. Ves No 18. Did you own \$50,000 or more in foreign residence such as solar water heaters, generators or fuel cells, or energy efficient improvements such as exterior doors or windows, insulation, heat pumps, furnamese, central air conditioners, water heaters, etc.? 18. Did you own \$50,000 or more in foreign water heaters, generators or fuel cells, or energy efficient improvements such as exterior doors or windows, insulation, heat pumps, furnamese, central air conditioners, water heaters, etc.? 18. Did you own \$50,000 or windows, insulation, heat pumps, furnamese, central air conditioners, water heaters, etc.? 18. Did you own \$50,000 or windows, insulation, heat pumps, furnamese, central air conditioners, water heaters, etc.? 18. Did you own \$50,000 or windows, insulation, heat pumps, furnamese, central air conditioners, water heaters, etc.? 18. Did you own \$50,000 or windows, insulation, heat pumps, furnamese, central ai		Yes	No		Yes	No
5. Were there any purish, actains, marriages, very liveres or adoptions in your immediate family? 6. Did you give a gift of more than \$17,000 to one runore people? 7. Did you have any debts canceled, forgiven, or yes no effinanced? 8. Did you own \$50,000 or more in foreign nancial assets? 8. Did you own \$50,000 or more in foreign nancial assets? 8. Did you own \$50,000 or more in foreign nancial desertion in the factor of the following information when the falling to protect against Identity theft. Please provide us with the following information (or a photocopy of the front and back of your license) below: **PNYS 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: **Expiration Date: Document Number: Please describe any unusual circumstances or events that you feel may affect your tax return.		Yes	No	identity theft and given an ID theft protection	Yes	No
6. Did you give a gift of more than \$17,000 to one Yes No rmore people? 7. Did you have any debts canceled, forgiven, or Yes No vehicle or electric vehicle? 8. Did you own \$50,000 or more in foreign yes No 22. 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, firmaces, central air conditioners, water heaters, etc.? 8. Additional Information 9. Additi		Yes	No	the 6 digit PIN.	ouse IRS	PIN-
7. Did you have any debts canceled, forgiven, or Yes No vehicle or electric vehicle? 8. Did you own \$50,000 or more in foreign Yes No inancial assets? 8. Did you own \$50,000 or more in foreign Yes No inancial assets? 8. Did you own \$50,000 or more in foreign Yes No inancial assets? 8. Did you own \$50,000 or more in foreign Yes No inancial assets? 8. Did you own \$50,000 or more in foreign Yes No inancial assets? 8. Did you own \$50,000 or more in foreign Yes No inancial assets? 9. So In Yes No inancial assets? 9. So In Yes No inancial assets? 9. So In Yes No inancial assets in formation 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: 1. Sessing State: 1. Sessing State: 1. Se		Yes	No	тахрауст по т пу.		
8. Did you install any energy property to your inancial assets? 8. Did you install any energy property to your inancial assets? 8. Did you install any energy property to your inancial assets? 8. Did you install any energy property to your inancial assets? 8. Did you install any energy property to your inancial assets? 8. Did you install any energy property to your inancial assets? 8. Did you install any energy property to your inancial assets? 8. Did you install any energy property to your inancial assets? 8. Did you install any energy property to your inancial assets? 8. Did you install any energy property to your inancial assets? 8. Did you install any energy property to your inancial assets? 8. Did you install any energy property to your inancial assets? 8. Did you install any energy property to your inancial assets? 8. Did you install any energy property to your inancial assets placed in provided in assets your energy property to your inancial assets? 8. Did you install any energy property to your incenses yell and your incenses, central air conditioners, water heaters, etc.? 8. Did you mind you install any energy property to your incenses, central air conditioners, water heaters, etc.? 8. Did you mind you		Yes	No		Yes	No
***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.		Yes	No	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	Yes	No
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.						
License Number:	Additional Information					
Document Number: Please describe any unusual circumstances or events that you feel may affect your tax return.	Issuing State:					
Please describe any unusual circumstances or events that you feel may affect your tax return.	Expiration Date:					
	Document Number:					
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