

Client tax questionnaire (yes/no)

2026 tax year (the return you file in 2027)

Prepared for the clients of (firm name)

Your name, and your spouse's if filing jointly

Answer yes or no to each question. You do not need to write any amounts on this form.

For every yes, upload the documents listed under the question. If you cannot find one, write what is missing in the notes.

New clients also answer the first group. Returning clients can skip it.

New clients only (fill in only if it applies)

Based on: Form 13614-C, IRS letters and IP PIN questions

Did another preparer, or you yourself, file your last return? ☐ Yes ☐ No

If yes, send: Last year's federal and state returns, with all schedules

Have you received a letter from the IRS or your state in the last three years? ☐ Yes ☐ No

If yes, send: A copy of each letter, front and back

Do you or your spouse have an Identity Protection PIN? ☐ Yes ☐ No

If yes, send: This year's IP PIN letter, or the PIN from your IRS online account

Are you claiming a dependent we have never seen before? ☐ Yes ☐ No

If yes, send: Social Security card or ITIN letter; Birth certificate

Household and life events

Based on: Form 13614-C, Part I and marital status

Did you marry, divorce or separate during the year? ☐ Yes ☐ No

If yes, send: Marriage certificate, or divorce decree with alimony terms

Was a child born or adopted, or did a dependent move in or out? ☐ Yes ☐ No

If yes, send: Social Security card for each new dependent; Adoption papers, if any

Did someone in your household die during the year? ☐ Yes ☐ No

If yes, send: Death certificate; Any letters testamentary

Did you move, or live in two or more states? ☐ Yes ☐ No

If yes, send: Move date; Old and new address

Can someone else claim you or your spouse as a dependent? ☐ Yes ☐ No

Work and wages

Based on: Form 13614-C, income page; Forms W-2

Did you work as an employee, including a second job or a job you left? ☐ Yes ☐ No

If yes, send: Form W-2 from every employer

Did you receive tips from customers? ☐ Yes ☐ No

If yes, send: Form W-2 or Form 1099 showing tips; Your own tip records

Were you paid overtime required by federal law (the half in time-and-a-half)? ☐ Yes ☐ No

If yes, send: Form W-2 or the employer's overtime statement

Did you receive unemployment or a state tax refund? ☐ Yes ☐ No

If yes, send: Form 1099-G

Gig work, side jobs and online sales

Based on: Forms 1099-NEC, 1099-MISC and 1099-K; Schedule C

Did you do freelance, contract, delivery or rideshare work? ☐ Yes ☐ No

If yes, send: Every Form 1099-NEC and Form 1099-K; Your income and expense records for the year

Were you paid in cash or through a payment app for any work? ☐ Yes ☐ No

If yes, send: Your own record of what you were paid

Did you sell goods online or through a marketplace? ☐ Yes ☐ No

If yes, send: Form 1099-K, if issued; What you paid for the items you sold

Savings, investments and retirement

Based on: Forms 1099-INT, 1099-DIV, 1099-B, 1099-R and SSA-1099

Did you earn bank interest or receive dividends? ☐ Yes ☐ No

If yes, send: Forms 1099-INT and 1099-DIV

Did you sell shares, funds, crypto or other digital assets? ☐ Yes ☐ No

If yes, send: Consolidated brokerage statement with Form 1099-B; Form 1099-DA, if issued

Did you take money out of a retirement account or receive a pension? ☐ Yes ☐ No

If yes, send: Form 1099-R

Did you receive Social Security benefits? ☐ Yes ☐ No

If yes, send: Form SSA-1099

Home, school, family and health

Based on: Form 13614-C, expenses and events page

Do you own a home with a mortgage? ☐ Yes ☐ No

If yes, send: Form 1098; Property tax bill

Did you buy or sell a home? ☐ Yes ☐ No

If yes, send: Closing statement; Form 1099-S, if issued

Do you own a property you rent out? ☐ Yes ☐ No

If yes, send: Rental income and expense summary; Form 1098 for that property

Did you or a dependent pay tuition or student loan interest? ☐ Yes ☐ No

If yes, send: Form 1098-T; Form 1098-E

Did you pay for childcare so you could work? ☐ Yes ☐ No

If yes, send: Provider name, address, tax ID and amount paid; Form W-2 showing any dependent care benefits from your employer

Did you buy health coverage through the Marketplace, or have an HSA? ☐ Yes ☐ No

If yes, send: Form 1095-A; Forms 1099-SA and 5498-SA

Deductions from the 2025 law (2025 to 2028), and 2026 changes

Based on: IRS fact sheet on the 2025 law; Form 1098-VLI; Publication 526

Did you buy a new car with a loan for personal use? ☐ Yes ☐ No

If yes, send: Loan statement or Form 1098-VLI showing interest paid; Vehicle identification number (VIN), or the label showing final assembly in the United States

Were you or your spouse 65 or older at the end of the year?	☐ Yes	☐ No
Did you give cash or goods to charity? <i>If yes, send: Receipts; The charity's written acknowledgment for larger gifts</i>	☐ Yes	☐ No
Did you open or fund a Trump account for a child? <i>If yes, send: Account statement showing contributions and dates</i>	☐ Yes	☐ No

Payments, foreign accounts and your refund

Based on: Form 1040-ES; FinCEN Form 114

Did you make estimated tax payments, or apply last year's refund? <i>If yes, send: Date and amount of each payment</i>	☐ Yes	☐ No
Did you have a bank or investment account outside the United States? <i>If yes, send: Year-end statement for each foreign account</i>	☐ Yes	☐ No
Do you want a refund paid into a new bank account? <i>If yes, send: Voided check or bank letter with routing and account numbers</i>	☐ Yes	☐ No
Has your driver's license or state ID changed since last year? <i>If yes, send: Copy of the current license or ID for each taxpayer</i>	☐ Yes	☐ No

Anything else your preparer should know