

The Toolbox 2023 Income Tax Interview Sheet

Please write legible.

Name:

Address:

Phone Number:

Email Address:

Date of Birth and SSN:

Marital/Filing Status:

First/Last Name

D.O.B

SSN

Spouse

Dependents

Dependents

Dependents

Sources of Income:

Wages:

Business Income:

Self Employed: Yes / No

Type of Business:

Interest Income:

Investments:

Unemployment Compensation:

Pensions/Social Security:

Rental Property:

Sale of Home or Property:

Other Income; Gambling, prizes, lottery, Miscellaneous:

Deductions:

Mortgage Interest:

Property Taxes:

Medical Expenses:

Charitable Contributions:

Education Expenses/Tuition:

Student Loan Interest:

Child Care Expenses:

Affordable Care Act/Form 1095-A:

Documentation Needed:

- Prior Year Tax Return
- Form W2
- Form 1099
- Form 1099G
- 1098, 1098-T, 1095-A, etc.

Business Questions:

Please explain the type of business and the business activity:

Are you a: Sole Proprietor: Yes / No
 Single Member LLC: Yes /No
 Partnership: Yes / No
 Corporation: Yes / No

How did you keep track of your income?

- Form 1099, 1099K:
- Checks/Bank Statements:
- QuickBooks:
- Spreadsheets:
- Other: Explain:

Do you have Inventory?

How do you keep track of Inventory?

How did you keep track of Expenses: ?

- Receipts
- Bank Statements
- QuickBooks
- Spreadsheets

Are Expenses categorized? If not, please categorize Expenses.

Do you have Employees?

- Did you file Forms 940 and 941?
- Did you issue Form 1099 to contractors?

Documentation:

- Prior Year Tax Return
- Forms 1099
- Books and Records for Income and Expenses.
- LLC Agreement

