



INDIVIDUAL TAX INTAKE QUESTIONNAIRE

Tax Year: 2026 | Please complete all sections thoroughly.

1. PERSONAL & CONTACT INFORMATION

A. Filing Entities (Primary Taxpayer & Spouse details)

Field / Information Line	PRIMARY TAXPAYER	SPOUSE
Full Legal Name		
Social Security No. / ITIN		
Date of Birth (MM/DD/YYYY)		
Occupation / Job Title		
Daytime Phone Number		
E-mail Address		

B. Shared / Joint Household Information

Shared Household Attributes	Applicable Shared Details / Inputs
Mailing Address (Street, Apt, City, State, ZIP)	
Filing Status Preferences / Changes	☐ Married Filing Jointly ☐ Married Filing Separately ☐ Single ☐ Head of Household * Note any changes from last year:
Principal Residence Ownership Status	☐ Owned Residence ☐ Rented Residence ☐ Moved during 2026
State(s) of Residence during 2026	Primary State: _____ Other State(s) if partial year: _____



2. DEPENDENTS INFORMATION

List all individuals who lived with you and received more than half of their support from you in 2026.

Dependent Full Legal Name	Social Security No.	Date of Birth	Relationship	Months in Home

3. INCOME CHECKLIST

Check all that apply to your financial scenario in 2026 and provide supporting documents (W-2s, 1099s, etc.).

☐ Salary / Wages (Form W-2)	☐ Social Security Benefits (Form SSA-1099)
☐ Independent Contractor / Self-Employed (1099-NEC)	☐ Real Estate Rental Income (Schedule E / 1099-MISC)
☐ Interest or Dividend Income (Form 1099-INT / DIV)	☐ K-1 Partnerships, S-Corps, or Trusts Distributions
☐ Stock, Crypto, or Property Sales (Form 1099-B / 1099-S)	☐ Unemployment Compensation (Form 1099-G)
☐ Retirement / Pension Distributions (Form 1099-R)	☐ Miscellaneous Income (Alimony, Gambling, Prizes)

☐ DIGITAL ASSETS / CRYPTOCURRENCY: At any time during 2026, did you receive, sell, exchange, gift, or otherwise dispose of any financial interest in any virtual currency or digital asset?



4. DEDUCTIONS & LIFE EVENTS

Check all that apply to uncover potential deductions, tax adjustments, or credits.

☐ Home Mortgage Interest paid (Form 1098)

☐ College Tuition / Higher Ed Expenses (Form 1098-T)

☐ Real Estate / Property Taxes paid

☐ Student Loan Interest paid (Form 1098-E)

☐ Contributions to Traditional or Roth IRAs outside of work

☐ High Medical Expenses paid out-of-pocket

☐ Health Savings Account (HSA) contributions/withdrawals

☐ Charitable Cash Donations or Non-Cash Contributions

☐ Major Life Events in 2026 (Marital status change, birth/adoption of child, purchased/sold primary residence, started business).

5. OTHER RELEVANT INFORMATION

Please note any additional details or unique tax scenarios here (e.g., foreign income, energy credits, expected tax changes):

6. VERIFICATION & SIGNATURES

To the best of my knowledge, the information provided in this document is accurate, complete, and correct.

Primary Taxpayer Signature

Date

Spouse Signature

Date