



REI Tax Firm - Specializing in Real Estate
www.REItaxfirm.com

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New Client Questionnaire

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All information that you provide in this organizer is strictly confidential. It is never shared, sold, or disclosed to anybody without your specific authorization, except as required by law (such as in a criminal investigation). This policy applies even when you are no longer our client. We maintain physical, electronic, and procedural safeguards to protect your nonpublic personal information - as required by federal regulations. Please refer to Tax Preparation Agreement for a more complete description of our privacy policy and procedures.

PLEASE READ THIS: for NEW clients: please fill out every field
for RETURNING clients: fill out only information that changed since last year

Mailing address for the IRS:
Physical address if different:
Prior address - until

Male individual form: First, Middle, Last, Occupation, Home, Cell, Work, E-mail, Soc. Sec. number, Date of birth, blind, disabled

Female individual form: First, Middle, Last, Occupation, Home, Cell, Work, E-mail, Soc. Sec. number, Date of birth, blind, disabled

Married - date:
Separated / Divorced - date:

Children and other dependents: Parents, relatives, and other people may qualify as dependents. Rules are complex.
If they earned any income (part-time jobs, side businesses, investments) - provide their forms: W2s & 1099s.
If they already filed their own tax returns - provide copies of their tax returns. Childrens' mistakes can hurt you.
For children of divorced / separated parents and for adopted children - provide details in the "comments" box.

Child 1 form: M/F, Relation, First, Mid., Last, DOB, SSN, in 2023, lived..., dependent of..., check all that applies

Child 2 form: M/F, Relation, First, Mid., Last, DOB, SSN, in 2023, lived..., dependent of..., check all that applies

Child 3 form: M/F, Relation, First, Mid., Last, DOB, SSN, in 2023, lived..., dependent of..., check all that applies

Comments (optional) If you need more space - add a blank page

Large empty box for comments

How did you find our firm? Google BiggerPockets Facebook Online ad Other, incl. referrals:

Preparing and filing tax returns

- YES NO OK to eFile my tax return...
YES NO OK for the IRS to call your firm...
YES NO OK for the IRS to give \$3 of my taxes to the Presidential election fund...
YES NO OK for the IRS to deposit my tax refund...
YES NO OK for the IRS to draw from my bank account...
checking savings Routing: Acct: You may split your refund between multiple bank accounts if you need to.

Your attitudes (this section is a bit playful, but important. Please choose your "best fit" answers seriously)

- Attitude towards recordkeeping: My records are in perfect order, more-or-less OK, a lot of work, What the heck is "records"?
Attitude towards clarifying your data: I want to get it just right, whatever effort it takes, I want it to be accurate but not kill myself, Cut corners, etc. - just get it over with
Attitude towards being tax-aggressive: I don't mind risk, and I want every penny, I'll take some risks but not too much, Conservative is my word. Let's avoid all red flags.
Attitude towards IRS audits: It is part of life, I'll deal with it, It would be awful, but what can I do?, Why did you mention it!?! Now I can't sleep at all !!!

Problems with the IRS or state tax departments

- Check if you have unresolved issues with the IRS (collection, installment agreements, unpaid refunds, etc.) Provide details.
Check if you were audited by the IRS in the past or in the process of being audited. If so - when, and what was the result?
Check if you have some delinquent student loans, child support, state income tax, or other debts. Please provide details.
Check if you have unresolved issues with state tax departments (franchise returns not filed, taxes not paid, audited, etc.)

Recent tax returns (new clients - please provide copies of tax returns starting from 2020. You can estimate dates.

Table with columns for Year (2020-2023), Filing Status (filed return/amended return), Date, Preparation Method (self-prepared/our firm/another preparer), and Refund Status (received tax refund/owed to the IRS & paid/still owe to the IRS).

Comments (optional) If you need more space - add a blank page

Blank text area for comments.