

Gautam CPAs, PLLC — Individual Tax Client Questionnaire

Please complete all applicable sections. Use N/A where needed.

SECTION 1 — BASIC INFORMATION

Full Legal Name

Spouse Full Legal Name (if applicable)

Spouse Date of Birth (if applicable)

Spouse SSN/TIN

Your Date of Birth

Your SSN/TIN

Email Address

Phone Number

Address

Filing Status (Check One):

- Single
- Married Filing Jointly
- Married Filing Separately
- Head of Household
- Qualifying Widow(er)

SECTION 2 — INCOME OVERVIEW

Did you receive W-2 income?

Yes

No

Select all income forms received:

1099-NEC

1099-MISC

1099-INT

1099-DIV

1099-B

1099-R

SSA-1099

Foreign Employer Statement

Foreign Pension

1098-T

CRYPTOCURRENCY ACTIVITY

Yes — trades, staking, NFTs, transfers

No crypto activity

RENTAL PROPERTY DETAILS

I had rental property income

No rental property

Property Address

Rental Income

Expenses

SECTION 3 — EXPAT & FOREIGN INFORMATION

Did you live outside the U.S. this year?

Yes No

Countries lived in

Foreign accounts over \$10k? (FBAR)

Yes No

List up to 5 foreign accounts (Bank – Country – Max Balance):

Foreign income types (check all):

- Foreign wages
- Foreign self-employment
- Foreign rental income
- Foreign dividends/interest
- Foreign pension

SECTION 4 — DEDUCTIONS, HEALTH, SIGNATURE & PRIVACY

Itemized Deductions (check all that apply):

- Mortgage Interest
- Property Taxes
- Charitable Donations
- Medical Expenses
- Student Loan Interest
- Tuition (1098-T)

Had health insurance all year?

Yes No

SECTION 5 — MISCELLANEOUS ITEMS

Check any items that may apply. Additional information may be required.

- I have dependents
- I pay childcare expenses
- I made estimated tax payments
- I paid qualified tuition (Form 1098-T)
- I purchased books/supplies for education
- I may qualify for an education credit
- I have other items not listed

SECTION 6 — SIGNATURE & PRIVACY DISCLOSURE

Signature: _____

Date: _____

PRIVACY & SSN COLLECTION STATEMENT:

Your SSN and spouse SSN are required for IRS verification.

All sensitive information is encrypted and stored securely.

We comply with IRS Circular 230, IRS Pub. 4557, and IRC §7216.

We do not disclose your information without your written consent unless required by law.