

ZAKI ENTERPRISE

Tax Client Interview

Tax year	Date	Referred by (if any)
----------	------	----------------------

Taxpayer

First name	Middle	Last name	Date of birth
Occupation	Phone	Email	

Spouse (if filing together)

First name	Middle	Last name	Date of birth
Occupation	Phone		

Address

Mailing address	City	State	ZIP code
-----------------	------	-------	----------

Filing status and dependents

- | | | |
|--|--|--|
| ☐ Single | ☐ Married filing jointly | ☐ Married filing separately |
| ☐ Head of household | ☐ Qualifying surviving spouse | |

Dependents: total # _____ children # _____ other relatives # _____

Income and records

Do you have records to support the income and expenses you will report (receipts, bills, payments, property tax, bank or card statements)? ☐ Yes ☐ No

INCOME AND TAX FORMS I HAVE

- | | | |
|---|---|---|
| ☐ W-2 | ☐ 1099-NEC / self-employed | ☐ 1099-K |
| ☐ 1099-INT | ☐ 1099-DIV | ☐ 1099-B / stocks / crypto |
| ☐ 1099-R | ☐ 1099-G | ☐ SSA-1099 (Social Security) |
| ☐ Rental income | ☐ Sale of property | ☐ Yearly summary (Uber / Lyft) |
| ☐ W-2G (gambling) | ☐ 1098 mortgage | ☐ 1098-T (tuition) |
| ☐ Child care expenses | ☐ 1095-A (Marketplace) | ☐ 1095-B / 1095-C |
| ☐ K-1 (partnership / S-corp / trust) | | |

CREDITS I MAY QUALIFY FOR (WE MAY ASK FOR PROOF A CHILD LIVED WITH YOU 6+ MONTHS)

- | | | |
|---|---|--|
| ☐ Child Tax Credit (CTC) | ☐ Earned Income Credit (EIC) | ☐ Education credit (AOTC) |
|---|---|--|

SUPPORTING DOCUMENTS I AM BRINGING

- | | | |
|---|--|--|
| ☐ School records | ☐ Landlord / rent records | ☐ Medical records |
| ☐ Social Security statement | ☐ Birth certificates | ☐ Social Security card copy |
| ☐ Photo ID / green card copy | ☐ Other: _____ | |

Acknowledgment

Be aware that you are responsible for the income and expenses reported on your tax return. You must show proof of all reported expenses in the form of receipts or credit card / bank statements if audited by the Internal Revenue Service.

Taxpayer signature	Date
Spouse signature	Date