

Individual Tax Intake

Organize filing status, household changes, income sources, deductions, credits, notices, and open questions before preparation begins.

FREE PDF RESOURCE	Free to view, download, print, and use internally as a general guide.
PUBLIC FORMAT	Watermarked public edition. Editing, assembly, and extraction are disabled in compliant PDF readers.
REUSABLE WORD VERSION	Available when this resource relates to a paid RiskWise engagement.

What this free resource includes

- 01 Household and filing changes
- 02 Income document inventory
- 03 Deductions and credits
- 04 Notices and open questions
- 05 Secure-document handoff

Use the working pages to collect facts, owners, evidence, and dates. Review tax, legal, security, licensing, employment, insurance, or regulatory decisions with the qualified professional appropriate to your facts.

Work through Individual Tax Intake

Record what is known, identify the source, assign an owner, and make missing information visible.

Household and filing changes

Purpose / facts / owner / evidence / date:

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Income document inventory

Purpose / facts / owner / evidence / date:

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Deductions and credits

Purpose / facts / owner / evidence / date:

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Finish the record and confirm the next step

Complete the remaining sections, then identify what needs review, approval, secure delivery, implementation, or follow-up.

Notices and open questions

Purpose / facts / owner / evidence / date:

Secure-document handoff

Purpose / facts / owner / evidence / date:

Choose the support you need

FREE PDF	Free	Use this public edition as an internal reference or printed working guide.
REUSABLE WORD TEMPLATE	Included	An editable Word version is available when it supports a related paid engagement.
CUSTOM WORK	Scoped	RiskWise can adapt, review, implement, document, or hand off the resource for your business.

Discuss a paid engagement

Call 702-421-1111 or email sales@ezypz.com and mention: Individual Tax Intake

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