

# Individual Tax Intake

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

|                                  |                                                                                             |
|----------------------------------|---------------------------------------------------------------------------------------------|
| <b>PROTECTED PDF<br/>PREVIEW</b> | View-only evaluation edition                                                                |
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## What the licensed edition includes

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

This preview is intentionally representative rather than fully reusable. It lets you evaluate the structure before licensing the editable working file.

## Inside Individual Tax Intake

The licensed edition expands every section with guided questions, response space, ownership fields, evidence prompts, and completion checks.

### Household and filing changes

Purpose / facts / owner / evidence / date:

### Income document inventory

Purpose / facts / owner / evidence / date:

### Preview note

Additional sections, guidance, and editable response areas are reserved for the licensed edition. This page demonstrates the working format and depth without distributing the complete reusable asset.

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|                    |                 |                                                                                  |
|--------------------|-----------------|----------------------------------------------------------------------------------|
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| COLLECTION LICENSE | Request pricing | A related set for one team or business function.                                 |
| CUSTOM BUILD       | Scoped service  | EZY PZ adapts the tool, implements the workflow, documents it, and hands it off. |

## Request this template

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