

Interview Questions

Select a few questions from each category to ask clients. You do not need to ask all questions listed!

Getting to know the client

1. Where do you live?
2. Are you working? If so, where do you work? What do you do?
3. What are your hobbies?
4. Are you in school/college?
5. Tell me about your family. (Find out the age of any children.)
6. What's one thing most people don't know about you?

Questions about the tax refund/ EITC

7. What's something you're looking forward to doing with your tax refund?
8. Will you save some of the refund? If so, what are you saving towards?
9. What does this money mean to you?
10. Have you claimed the EITC before? How has it helped you in the past?

Questions about the tax site and experience

11. Was this your first time at this tax site? If so, how did you hear about us?
12. What was your first impression of us?
13. Why did you choose to get your taxes done here?
14. Did you take advantage of any other financial services?
15. Have you paid for tax preparation services before? How much did it cost?
16. What are three adjectives you would use to describe taxes?
17. What was your relationship like with your volunteer tax preparer?
18. What does it mean to you that this experience is free?

Questions about finances

"Do you mind if I ask some questions about your finances? You can skip any questions you feel uncomfortable answering."

19. What were your finances like this past year?
20. What was the biggest financial burden you faced?
21. How would you like to change your finances for the future?
22. How will the additional wait time to receive your refund impact you? (Only ask filers interviewed before February 15, 2017.)

Miscellaneous

23. Is there anything else you'd like me to know?
24. What would you want to tell someone else coming in for the first time?
25. What surprised you most about your tax experience?
26. What did you learn today?
27. What inspires you?