



## NYC Annual Tax Season Initiative

**Tax Season  
2026**

### **Instructions**

On the following pages, please find the client survey for Tax Season 2026. Please note that survey responses are submitted at the *site* level for End-of-Season reports. Please ensure that your data tracking system allows you to report responses for each site.

Please note, the survey should be completed by each tax filer (at least one spouse for married couples). Tax preparers and/or intake staff may assist with survey completion, as long as they allow clients to provide their own response(s) to each question. You may include additional survey questions. Please do not remove questions or alter the questions without prior approval from DCWP.

Please contact OFE with any questions.

**1. Have you ever filed a tax return?**

- Yes
- No
- Prefer not to answer

**2. If yes, have you filed a tax return consecutively for the last 3 years?**

- Yes
- No
- Prefer not to answer

**3. How did you file your taxes last year?**

- Here or another NYC Free Tax Prep Site
- On my own using the paper form or free or online tax filing option
- Friend or Family prepared for me
- Paid a tax service (e.g., H&R Block)
- Other: \_\_\_\_\_
- I don't remember
- Did not file taxes last year
- Prefer not to answer

**4. Between November 2025 and today, do you remember seeing any of the following NYC Free Tax Prep promotions?**

*Please check all that apply.*

- Postcard or letter
- Text Message or Email
- Subway Advertisement
- Bus Shelter or Telephone Kiosk Advertisement
- Online Advertisement (such as Facebook or Instagram)
- Newspaper Advertisement
- TV Advertisement
- Radio Advertisement
- Brochure
- Other: \_\_\_\_\_
- Prefer not to answer

**5. What impact did the advertisement have on you?**

*Please check all that apply.*

- Made me aware of this service
- Made me interested to find out more about this service
- Made me check out locations
- Made it feel like something I needed to take advantage of
- Made me talk about it with other people I know
- Led to me searching for info about it online
- Led to me to actually using NYC Free Tax Prep
- Didn't have any impact on me
- Prefer not to answer

**6. Were you referred to NYC Free Tax Prep (for example, did a government office, non-profit, or hospital suggest you use these services?) If so, by what organization?**

- Yes
- No
- Organization Name: \_\_\_\_\_

**7. On a scale of 0 to 10, how likely would you be to recommend NYC Free Tax Prep to a friend or family member?**

- |            |                       |                       |                       |                       |                       |                       |                       |                       |                       |                       |                       |                  |
|------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|------------------|
|            | 0                     | 1                     | 2                     | 3                     | 4                     | 5                     | 6                     | 7                     | 8                     | 9                     | 10                    |                  |
| Not likely | <input type="radio"/> | Extremely likely |

**8. What do you plan to do with your tax refund?**

*Please check all that apply.*

- I am not receiving a tax refund
- Rent
- Household expenses (groceries, clothes, school supplies etc.)
- Furniture or electronics
- Bills
- Savings
- Other: \_\_\_\_\_
- Prefer not to answer

**9. Compared to last year, how difficult has it been this year for your household to pay for usual household expenses, including but not limited to food, rent or mortgage, car payments, medical expenses, and student loans? *Select only one answer.***

- More difficult than last year.
- Same level of difficulty as last year.
- Less difficult than last year.

**10. Do you have any of the following types of bank accounts or financial products? *Please check all that apply***

- Checking account
- Savings account
- Home mortgage
- Credit card
- Retirement account
- Student loans
- Other, please specify: \_\_\_\_\_
- Prefer not to answer

**11. How do you describe your primary employment status?**

- Employed full time  
(Work at least 35 hours/week)
- Employed part-time  
(Work fewer than 35 hours/week)
- Self-employed/Own business
- Retired
- Full-time student
- Part-time student
- Stay at home parent/spouse
- Temporarily/permanently disabled
- Unemployed
- Other, Please Specify: \_\_\_\_\_
- Prefer not to answer

**12. What best describes your household income in 2025? (Please include all sources of income, like SSI, Retirement, Child Support.)**

- Less than \$10,000
- \$10,000 - \$19,999
- \$20,000 - \$29,999
- \$30,000 - \$39,999
- \$40,000 - \$49,999
- \$50,000 or more
- Prefer not to answer

**13. How many children or dependents do you have ages 0-17?**

- 0
- 1
- 2
- 3
- 4+

**14. How do you identify your gender?**

- Female
- Male
- Non-binary/third gender
- Prefer to self-describe, please specify: \_\_\_\_\_
- Prefer not to answer

**15. Which languages do you speak at home?**

- English
- Spanish
- Arabic
- Bengali
- Chinese (any dialect)
- French
- Haitian Creole
- Korean
- Polish
- Russian
- Urdu
- Other, Please Specify \_\_\_\_\_

**16. If you are Hispanic or Latino, how do you identify your race(s)? Please check all that apply.**

- Does not apply
- White
- Black/African-American
- Asian
- American Indian/Alaska Native
- Native Hawaiian/Pacific Islander
- Multiracial
- Other: \_\_\_\_\_
- Prefer not to answer

**17. If you are not Hispanic or Latino, how do you identify your race? Please check all that apply.**

- Does not apply
- White
- Black/African-American
- Asian
- American Indian/Alaska Native
- Native Hawaiian/Pacific Islander
- Multiracial
- Other: \_\_\_\_\_
- Prefer not to answer

**18. How do you describe your living situation?**

- Own
- Rent – Market rate
- Rent – Reduced cost or free through NYCHA
- Rent – Reduced cost or free through other program
- Staying with Family or Friends
- Shelter
- Transitional Housing
- Other, Please Specify: \_\_\_\_\_
- Prefer not to answer

**19. Were you a borrower or co-borrower for a federal student loan in 2025? If so, which applies to you?**

- I do not have federal student loans
- I have made a final payment for my federal student loans
- I was granted forgiveness for my federal student loans
- I make my monthly payments on time
- I am in deferment or forbearance
- I am late with my payments or in default
- I received a collection notice for my federal student loans
- I don't know
- Prefer not to answer