

Tax Preparation and Financial Planning Questions

Client Name: _____

Tax Preparer: _____

- | | Yes | No |
|--|--------------------------|--------------------------|
| 1) Were there any births, adoptions, marriages, divorces, or deaths in your immediate family during this year? Please specify: _____ | <input type="checkbox"/> | <input type="checkbox"/> |
| 2) Are you planning to claim the same dependents as you did last year? | <input type="checkbox"/> | <input type="checkbox"/> |
| 3) Are any of your unmarried children, who might be claimed as dependents, 19 years of age or older?
If 19 or older, were they full-time students? _____ | <input type="checkbox"/> | <input type="checkbox"/> |
| 4) Did anyone in your household have any tuition expenses?
If yes, please provide the Form 1098-T from the school attended.
How many years have they been in college? _____ | <input type="checkbox"/> | <input type="checkbox"/> |
| 5) Did you incur any childcare expenses so that you or your spouse could work or go to school? | <input type="checkbox"/> | <input type="checkbox"/> |
| 6) Did you make any contributions to an IRA? | <input type="checkbox"/> | <input type="checkbox"/> |
| 7) Did you take any distributions from a retirement plan (pension, IRA, 401(k), 403(b)? If so, please provide the Form 1099-R | <input type="checkbox"/> | <input type="checkbox"/> |
| 8) Did everyone in your household have health insurance all year?
Do you have health insurance through; Your employer <input type="checkbox"/> Covered CA <input type="checkbox"/> Other <input type="checkbox"/>
If you selected Covered CA, please provide a copy of the Form 1095-A | <input type="checkbox"/> | <input type="checkbox"/> |
| 9) Did you purchase solar panels for a home or business?
Are you planning on purchasing one in 2021? _____ | <input type="checkbox"/> | <input type="checkbox"/> |
| 10) Did you enter a forbearance or stop payments on any of your mortgages? | <input type="checkbox"/> | <input type="checkbox"/> |
| 11) Did you purchase, sell or refinance a home?
Please specify: _____ Please provide a copy of your Closing Statement(s). | <input type="checkbox"/> | <input type="checkbox"/> |
| 12) Did you experience a short sale/foreclosure/loan modification on any properties in 2020? | <input type="checkbox"/> | <input type="checkbox"/> |
| 13) Did you have any debts cancelled or forgiven (e.g. Forms 1099-C or 1099-A)? | <input type="checkbox"/> | <input type="checkbox"/> |
| 14) Did you have any bank accounts or other assets outside of the United States over \$10,000 in value? | <input type="checkbox"/> | <input type="checkbox"/> |
| 15) At any time during 2020, did you receive, sell, send, exchange, or otherwise acquire any financial interest in any virtual currency? | <input type="checkbox"/> | <input type="checkbox"/> |
| 16) Did you make any estimated tax payments?
If yes, please provide us the amounts and dates of the payments. | <input type="checkbox"/> | <input type="checkbox"/> |
| 17) Did you purchase any items outside of CA for which you did not pay CA sales tax? | <input type="checkbox"/> | <input type="checkbox"/> |
| 18) Were you paid unemployment benefits during the calendar year? | <input type="checkbox"/> | <input type="checkbox"/> |
| 19) Did you take a hardship withdrawal from a retirement account due to COVID-19? | <input type="checkbox"/> | <input type="checkbox"/> |
| 20) Do you have a non-IRA brokerage account? If so, please provide all pages of the Yearend Tax Statement | <input type="checkbox"/> | <input type="checkbox"/> |
| 21) Did you receive a Stimulus Payment in 2020? | <input type="checkbox"/> | <input type="checkbox"/> |

Client Signature: _____ Date _____