



Tax Preparation and Financial Planning Questionnaire

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) Has your bank direct deposit information changed from the prior year? If so, please provide updated Routing# _____ & Acct# _____	<input type="checkbox"/>	<input type="checkbox"/>
3) Did you have any bank accounts or other assets outside of the U.S. over \$10,000 in value?	<input type="checkbox"/>	<input type="checkbox"/>
4) 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"/>
5) Did you experience a short sale/foreclosure/loan modification on any properties in 2020?	<input type="checkbox"/>	<input type="checkbox"/>
6) Did you have any debts cancelled or forgiven (e.g. Forms 1099-C or 1099-A)?	<input type="checkbox"/>	<input type="checkbox"/>
7) 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"/>
8) Did you purchase any items outside of CA for which you did not pay CA sales tax?	<input type="checkbox"/>	<input type="checkbox"/>
9) Were you paid unemployment benefits during the calendar year?	<input type="checkbox"/>	<input type="checkbox"/>
10) Did you receive a Stimulus Payment in 2021? If yes, please provide amounts received. 3rd Stimulus(Rec'd March 2021) \$ _____	<input type="checkbox"/>	<input type="checkbox"/>
11) Did you receive a Golden State Stimulus payment in 2021? If yes, please provide amounts received. \$ _____	<input type="checkbox"/>	<input type="checkbox"/>

DEPENDENTS- If you do not have a dependent, SKIP		
12) Did your dependents change from last year? If yes, what changed? _____	<input type="checkbox"/>	<input type="checkbox"/>
13) 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"/>
14) Did you receive the Advance Child Tax Credit payments in 2021? If so, please provide a copy of the letter received from the IRS or provide amounts received. (Letter 6419) July\$ _____ Aug\$ _____ Sept\$ _____ Oct\$ _____ Nov\$ _____ Dec\$ _____	<input type="checkbox"/>	<input type="checkbox"/>
15) Did you incur any childcare expenses so that you or your spouse could work or go to school?	<input type="checkbox"/>	<input type="checkbox"/>

Yes No

DEDUCTIONS			
16)	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"/>
17)	Did you purchase solar panels for a home or business? Are you planning on purchasing one in 2021? _____	<input type="checkbox"/>	<input type="checkbox"/>
18)	Did you enter a forbearance or stop payments on any of your mortgages?	<input type="checkbox"/>	<input type="checkbox"/>
19)	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"/>
20)	Did you make any cash donations in 2021? If so, how much \$ _____	<input type="checkbox"/>	<input type="checkbox"/>

RETIREMENT- If you do not have a retirement plan, SKIP			
21)	Did you make any contributions to an IRA? Not through your W2 wages.	<input type="checkbox"/>	<input type="checkbox"/>
22)	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"/>
23)	At any time during 2021, did you receive, sell, send, exchange, or otherwise acquire any financial interest in any virtual currency?	<input type="checkbox"/>	<input type="checkbox"/>
24)	Did you take a hardship withdrawal from a retirement account due to COVID-19?	<input type="checkbox"/>	<input type="checkbox"/>
25)	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"/>

Client Signature: _____

Date: _____