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:	□	□
2)	Has your bank direct deposit information changed from the prior year? If so, please provide updated Routing#_________________ & Acct# ___________________	□	□
3)	Did you have any bank accounts or other assets outside of the U.S. over $10,000 in value?	□	□
4)	Did everyone in your household have health insurance all year? Do you have health insurance through; Your employer □ Covered CA □ Other □ If you selected Covered CA, please provide a copy of the Form 1095-A	□	□
5)	Did you experience a short sale/foreclosure/loan modification on any properties in 2022?	□	□
6)	Did you have any debts cancelled or forgiven (e.g. Forms 1099-C or 1099-A)?	□	□
7)	Did you make any estimated tax payments? If yes, please provide us the amounts and dates of the payments.	□	□
8)	Did you purchase any items outside of CA for which you did not pay CA sales tax?	□	□
9)	Were you paid unemployment benefits during the calendar year?	□	□
10)	Did you receive the CA Middle Class Tax Refund? If so, please provide Form 1099-MISC.	□	□

	DEPENDENTS- If you do not have a dependent, **SKIP**		
11)	Did your dependents change from last year? If yes, what changed? ____	□	□
12)	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? __________________	□	□
13)	Did you incur any childcare expenses so that you or your spouse could work or go to school?	□	□

	DEDUCTIONS		
14)	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? ______	□	□
15)	Did you purchase solar panels for a home or business?	□	□
16)	Did you purchase, sell or refinance a home? Please specify: ____________________Please provide a copy of your Closing Statement(s).	□	□
17)	Did you make any cash donations in 2022? If so, how much $_____________	□	□
18)	Did you make any non-cash donations in 2022? If so, please provide Donation Receipt(s).	□	□

	RETIREMENT- If you do not have a retirement plan, **SKIP**		
19)	Did you make any contributions to an IRA? Not through your W2 wages.	□	□
20)	Did you take any distributions from a retirement plan (pension, IRA, 401(k), 403(b)? If so, please provide the Form 1099-R	□	□
21)	At any time during 2022, did you receive, sell, send, exchange, or otherwise acquire any financial interest in any virtual currency?	□	□
22)	Do you have a non-IRA brokerage account? If so, please provide all pages of the Year-end Tax Statement	□	□

Client Signature: _________________________ Date: _____________________