



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 2023?	<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"/>

DEPENDENTS- If you do not have a dependent, SKIP			
10)	Did your dependents change from last year? If yes, what changed? _____	<input type="checkbox"/>	<input type="checkbox"/>
11)	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"/>
12)	Did you incur any childcare expenses so that you or your spouse could work or go to school?	<input type="checkbox"/>	<input type="checkbox"/>

DEDUCTIONS			
13)	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"/>
14)	Did you purchase solar panels for a home or business? If so, please provide purchase contract.	<input type="checkbox"/>	<input type="checkbox"/>
15)	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"/>
16)	Did you make any cash donations in 2023? If so, how much \$ _____	<input type="checkbox"/>	<input type="checkbox"/>
17)	Did you make any non-cash donations in 2023? If so, please provide Donation Receipt(s).	<input type="checkbox"/>	<input type="checkbox"/>

RETIREMENT- If you do not have a retirement plan, SKIP			
18)	Did you make any contributions to an IRA? Not through your W2 wages.	<input type="checkbox"/>	<input type="checkbox"/>
19)	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"/>
20)	At any time during 2023, did you receive, sell, send, exchange, or otherwise acquire any financial interest in any virtual currency?	<input type="checkbox"/>	<input type="checkbox"/>
21)	Do you have a non-IRA brokerage account? If so, please provide all pages of the Year-end Tax Statement	<input type="checkbox"/>	<input type="checkbox"/>

Client Signature: _____

Date: _____