FINANCIAL ACCOUNTING SERVICES INC.

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)	If your return results provide you with a refund, would you like the refund directly deposited? 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 2025?	□	□
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?	□	□

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

	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? _____	□	□
14)	Did you purchase a NEW (not used or leased) car, SUV, truck, minivans or motorcycles under 14,000 lbs GVWR (Gross Vehicle Weight Rating) and that has undergone final assembly in the United States. If so, please provide a copy of your final purchase Statement(s) and total Interest paid in 2025.	□	□
15)	Did you purchase solar panels for a home or business? If so, please provide purchase contract.	□	□
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 2025? If so, how much $_____	□	□
18)	Did you make any non-cash donations in 2025? 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 2025, 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: _____