

## 2019 Tax Questionnaire. Please Check all questions that apply to you.

- Did your marital status change during the year? If yes, please explain.
- Did your address change during the year? If yes, please provide updated address and date of move.
- Could you be claimed as a dependent on another person's tax return for 2019?
- Were there any changes in dependents? If yes, please explain.
- Provide date of birth for you, your spouse and dependents (new clients)
- Were any of your unmarried children who might be claimed as dependents 19 years of age or older at the end of 2019? If not a full-time student, is child's income \$4,200 or more?
- Did you have any children under age 19 or full-time students under age 24 at the end of 2019, with interest and dividend income in excess of \$1,100, or total investment income in excess of \$2,200?
- Do you want to allocate \$3 to the Presidential Election Campaign Fund?
- Does your spouse want to allocate \$3 to the Presidential Election Campaign Fund?
- May the IRS discuss your tax return with your preparer?
- Were you notified or audited by either the Internal Revenue Service or the State taxing agency? Attach notice If you received a PIN letter, attach.
- Did you cash any Series EE U.S. savings bonds issued after 1989 and pay qualified higher education expenses for yourself, your spouse, or your dependents?
- Did you receive any disability income, unemployment, or social security? Provide forms 1099-G, SSA-1099, etc.
- Did you have any foreign income or pay any foreign taxes? Provide information statements.
- Did you have an interest in or signature authority over a financial account in a foreign country, such as a bank account, securities account, or other financial account, including foreign trusts and annuities? You are required to report their existence.
- Did you timely file FBAR (FinCEN-filed through BSA e-filing system and not included in this return filing-due date 4/15 with automatic extension to 10/15) ? Please attach copy.
- Did you buy or sell any stocks, bonds or other investment property in 2019? Provide brokerage statements showing sales and cost basis so I can calculate your gain or loss. Attach all 1099-B's and 1099-S.
- Did you purchase, sell, or refinance your principal home or second home, or did you take a home equity loan? Include copy of your closing settlement statement and year-end mortgage statements.
- Did you make any residential energy improvements (life-time limits apply) or did you make a purchase involving solar energy?
- Did you purchase a " new" plug-in electric vehicle (note: CA plug in vehicle rebate is taxable)?
- Did you have any debt canceled or forgiven including credit cards or real estate? (provide 1099-C/1099-A)
- Does anyone owe you money which has become uncollectible? Note: the IRS considers loans between family members to be "gifts" unless your documentation of the debt and substantiation of collectability is complete.
- Did you incur a loss because of damaged or stolen property of which exceeds 10% of your adjusted gross income? CA only.

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- Do you have any out-of-state or internet purchases for which California Sales Tax was not charged? If so, California use tax must be calculated and reported.
- Did you receive a distribution from a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.), provide 1099R? (If age 70.5 in 2019 a required minimum distribution may be required; age 72 starting in 2020.) RMD Waived for 2020.
- Did you make, or plan to make, a contribution to a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.)?
- Did you transfer or rollover any amount from one retirement plan to another retirement plan? provide 1099R (Only one rollover is allowed per year, direct transfers between IRA's by trustees does not trigger this limitation.)
- Did you convert all or a portion of your traditional, SEP, or SIMPLE IRA to a Roth IRA in 2019? Attach 1099R
- If you, or your spouse, have self-employment income, do you want to make a retirement plan contribution by the due date of your tax returns or extended date?
- Did you receive a distribution from an Education Savings Account or a Qualified Tuition Program and use for qualified education expense? (provide 1099Q)
- Did you, your spouse, or a dependent incur any tuition expenses that are required to attend a college, university, or vocational school and pay during current year? (provide form 1098-T. No credit allowed without this form)
- Did you work out of town for part of the year and incur expenses for which you were not reimbursed? CA only unless self-employed
- Did you use your car on the job (other than to and from work) and have written records? If yes provide mileage. CA only, unless self-employed.
- Did you apply an overpayment of 2018 taxes to your 2019 estimated tax (instead of being refunded)?
- If you have an overpayment of 2019 taxes, do you want the excess applied to your 2020 estimated tax (instead of being refunded)?
- Do you expect your 2020 taxable income and withholdings to be different from 2019? If yes, we need to discuss if you need to make estimated tax payments for 2020.
- Federal and state laws require that tax returns be filed electronically. There will be an additional preparation fee of \$100, if you request paper filing. Please sign your e-file authorization form by July 11th unless your returns are extended.
- Was your primary or second home rented out or used for business? Please explain.
- Do you have a rental activity and would like to discuss the qualifications to apply the 20% QBI deduction?
- Did you incur moving expenses due to a change of employment (over 50 miles-CA only)?
- Did you engage the services of any household employees and need to file payroll reports? 2019 threshold is \$2,100.
- Did you or your spouse make any gifts to an individual or trust that total more than \$15,000?
- Did you have a medical savings account (MSA-NOT an HSA), or acquire an interest in an MSA or a Medicare + Choice MSA because of the death of the account holder? Or, were you a policyholder who received payments under a long-term care (LTC) insurance contract or received any accelerated death benefits from a life insurance policy?

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- Did you (your employer) or your spouse (spouse's employer) contribute or withdraw funds used for unreimbursed qualified medical expenses, from a health savings account (HSA not FSA)? Provide 5498SA/1099SA
- Do you want your tax refunds directly deposited in your bank? If yes and your bank account information changed since last year, provide updated bank account # or you have never provided to me.
- Do you want your tax balance due and or estimated taxes directly withdrawn from your bank account? If yes and your bank account information changed within the last twelve months, provide updated bank account #(or if you have never provided to me)
- Did you pay estimated taxes for 2019? If yes, please attach detail for amounts and dates paid.
- Do you want me to file an extension on your behalf? If yes, I will let you know if I need additional information. Extended returns are due 10/15
- Did you have CA FTB withholding for a sale of real estate? If yes, attach form 593-B.
- Did you incur medical expenses that exceeds 7.5% of your adjusted gross income? If yes provide total amount.
- Did you make charitable contribution of \$250 or more? If yes, please attach statement or letter from the charity. If the value of your donated goods exceeds \$5,000, attach appraisal.
- Provide the amount of out-of-pocket expenses you incurred while performing charity work.
- Are you over age 70 ½ and directly transferred IRA fund to an eligible charity? You can transfer up to \$100,000 per year and include as part of your RMD.
- Do you own a business(or qualified business rental property) and paid anyone \$600 or more while doing business? If yes, you may be required to file 1099s.
- Do you invest your IRA funds in a limited partnership that earned \$1,000 or more this year? If yes, you may be subject to additional tax and filings for this as unrelated business income (UBI) and need to check with your plan administrator.
- Were you a resident of, or did you have income from, more than one state during the year? If yes, provide details.
- Did you or your family receive any advance premium tax credits? Attach form 1095A.
- Did you invest in an opportunity zone fund? Please explain or attach documentation.
- Did you invest in a partnership or S corporation? Please attach K-1's.
- Did you receive or pay spousal support (payment must be court ordered pre-2019 to deduct)? If yes, provide amount and date of divorce decree.
- Were you granted, or did you exercise any stock options? If yes, provide details.
- Do you have records to support business travel, entertainment, or gift expenses? The law requires you document, time and place, date, business purpose.
- Did you incur expenses as an elementary or secondary educator? If yes, how much?
- Did you pay childcare expenses? Please include childcare provider's name, address, phone # and TIN or SSI #
- Did you receive gambling winnings? Attach W2G and statement of losses.
- Did you pay interest on a student loan? If yes, provide amount.
- Did you receive, sell, send, exchange or otherwise acquire any financial interest in virtual currency? If yes attach documentation.
- Please list any questions or concerns you might have.