

If any of the following items pertain to you or your spouse for 2018, please check the appropriate box and provide additional information if necessary.

### PERSONAL INFORMATION

- | Yes                      | No                       |  |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Did your marital status change during the year?                              |
| <input type="checkbox"/> | <input type="checkbox"/> | Did your address change from what was shown on your prior year return?       |
| <input type="checkbox"/> | <input type="checkbox"/> | Could you be claimed as a dependent on another person's tax return for 2018? |

### DEPENDENTS

- |                          |                          |  |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Were there any changes in dependents?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Are you the custodial parent of all the dependents you are claiming?   |
| <input type="checkbox"/> | <input type="checkbox"/> | Were any of your unmarried children who might be claimed as dependents 19 years of age or older at the end of 2018?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have any children under age 19 or full-time students under age 24 at the end of 2018, with interest and dividend income in excess of \$1,050, or total investment income in excess of \$2,100? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you incur any child care expenses required in order to allow you to work?  |

### HEALTH CARE COVERAGE

- |                          |                          |  |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Did you and your dependents have healthcare coverage for the full-year? If not, provide dates of coverage during 2018.   |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive any of the following IRS Documents? Form 1095-A (Health Insurance Marketplace Statement), 1095-B (Health Coverage) or Form 1095-C (Employer Provided Health Insurance Offer and Coverage) <i>If so, please attach. (Note: if you are covered by Medicare, you won't receive a 1095 form)</i>   |
| <input type="checkbox"/> | <input type="checkbox"/> | If you or your dependents did not have health care coverage during the year, do you fall into one of the following exemption categories: Indian tribe membership, health sharing ministry membership, religious sect membership, incarceration, exempt non-citizen or economic hardship? <i>If you received an exemption certificate, please attach.</i> |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you pay any long-term care premiums during 2018?   |

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- Did you (or someone on your behalf, including your employer) make contributions to a health savings account (HSA) this year? Or, did you receive an HSA distribution or acquire an interest in an HSA due to the death of the account beneficiary? (*Note: an HSA does not refer to a Flexible Spending Account maintained through an employer*)

**INCOME**

- Did you receive or pay any alimony during 2018?
- Did you receive unemployment compensation during 2018? *If yes, provide Form 1099-G.*
- Did you receive any disability income?
- During 2018, did you cash any Series EE U.S. savings bonds issued after 1989 to pay qualified higher education expenses for yourself, your spouse, or your dependents?
- Did you rent out your home, or a portion of it, to someone during 2018? (*note: this includes AirBnB or VRBO type rental activities*)
- Did you receive unreported tip income of \$20 or more in any month?
- Did you have any foreign income or pay any foreign taxes?

**PURCHASES, SALES AND DEBT**

- Did you start a business during 2018?
- Did you purchase rental property during 2018? *If yes, provide the settlement sheet (HUD-1).*
- Did you acquire an interest in a partnership, LLC, S corporation, trust, or estate during 2018? *If yes, provide Schedule K-1 issued to you by the organization.*
- Did you purchase or dispose of any business assets (furniture, equipment, vehicles, real estate, etc.) during 2018, or convert any personal assets to business use?
- Did you buy or sell any stocks, bonds or other investment property in 2018?
- Did you buy or sell any "qualified small business stock" in 2018?
- Were you granted any restricted stock or did you exercise any stock options during the year?

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- Did you engage in either a purchase or sale transaction involving bitcoins or other virtual currency? *If so, provide a complete summary of all related transactions.*
- Did you collect on any installment contract during the year?
- Did you dispose of any property in 2018 by reason of foreclosure or short-sale?
- Did you purchase, sell, or refinance your principal home or second home, or did you take a home equity loan in 2018? *If yes, provide the settlement sheet (Closing Disclosure) and Form 1099-S (if applicable).*
- Do you have a mortgage or home equity loan on your principal residence (i) that is not the original mortgage used to purchase your home AND (ii) where some portion of the mortgage proceeds were used for purposes other than making home improvements?
- During 2018, did you purchase any solar electric property or solar water heating property for your home which qualify for federal tax credits? *If yes, please provide us with a copy of the invoice(s) for the items purchased. (Note: solar water heating panels for swimming pools do not qualify)*
- During 2018, did you enter into a solar purchase contract for which you are making payments through your property tax bill? *If so, please provide us a copy of the contract and your property tax bill.*
- Did you have any debts cancelled, discharged or forgiven in 2018?
- Did anyone owe you money on a documented loan which became uncollectible in 2018?

**RETIREMENT PLANS**

- At any time during 2019, will you be over 70 1/2 with an account balance in any traditional IRA, SEP IRA, or SIMPLE IRA?
- Did you receive a distribution from a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.) during 2018?
- Did you transfer or rollover any amount from one retirement plan to another retirement plan during 2018?
- Did you convert part or all of your traditional, SEP, or SIMPLE IRA to a Roth IRA during 2018?
- Did you make a contribution to a retirement plan (IRA, SEP, SIMPLE, Qualified Plan, etc.) for 2018?

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**Miscellaneous Questions**

- If you are eligible and have not done so, do you want to make a contribution for 2018 to your IRA or self-employed retirement plan? (Note: IRA contributions for 2018 must be made on or before April 15, 2019)

**EDUCATION**

- Did you receive a distribution during 2018 from an Education Savings Account or a Qualified Tuition Program account (529 Plan)?
- Did you, your spouse, or a dependent pay any tuition expenses that were required to attend a college, university, or vocational school? *If so, please provide Form 1098-T issued by the school.*

**ITEMIZED DEDUCTIONS** (Note: while many of these questions are no longer applicable for federal purposes, they are still applicable for state purposes)

- During 2018, did you incur a loss because of stolen property or property damaged by a casualty? *If so, please provide details*
- Did you work out of town for part of the year and incur business expenses for which you were not reimbursed?
- Did you use your car on the job (*other than commuting to and from work*) for which your employer did not reimburse your expenses related to the business travel?
- Do you have a home office that is used exclusively for qualified business purposes?
- Did you incur moving expenses during 2018 due to a change of employment?

**ESTIMATED TAXES**

- Do you expect a large fluctuation in your income, deductions or withholding from 2018 to 2019? (Other than the new tax law changes) For example - change in employment, buying/selling real estate, change in marital status. *If yes, provide details.*
- If you are required to make FEDERAL estimated tax payments for 2019, do you want to schedule your estimates to be automatically withdrawn from your bank account through electronic debit on each of the quarterly due dates? (Note: the automatic electronic debit may be cancelled at any time during the year)
- If you are required to make CALIFORNIA estimated tax payments for 2019, do you want to schedule your estimates to be automatically withdrawn from your bank account through electronic debit on each of the quarterly due dates? (Note: the automatic electronic debit may be cancelled at any time during the year)

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## Miscellaneous Questions

## MISCELLANEOUS

- Do you want to opt out of e-filing your tax return and file a paper return instead *(note: paper filing requires longer processing time)*?
- 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 our firm as your tax preparer?
- Have you received a federal IP PIN as the result of being a victim of identity theft? *Please provide us with a copy of the federal IP PIN notice.*
- Did you have an interest in or have signature or other authority over a financial account in a foreign country, such as a bank account, securities account, or other financial account whereby the balance exceeded \$10,000 at any point in time during 2018?
- During 2018, did you receive a distribution from, or were you the grantor of, or transferor to, a foreign trust or did you have an interest in any foreign assets or accounts?
- Did you purchase a new electric or plug-in hybrid vehicle during 2018 that is eligible for a tax credit? *If yes, provide the purchase invoice*
- Did you engage the services of any household employees during 2018 whereby you paid the household employee wages of \$2,000 or more during 2018? *(this does not refer to independent contractors or those employed by an outside agency)*
- If you were a California resident during 2018, did you purchase any products outside of California for which you did not pay any California sales tax? *If yes, provide the total amount of untaxed out-of-state purchases. (Note: common untaxed out-of-state purchases include, but are not limited to: internet, mail-order and shopping channel purchases of clothing, toys, electronics, household items and jewelry)*
- During 2018, if you had combined gross receipts in excess of \$100,000 from Schedule C (sole proprietorships) and Schedule E (rental properties) businesses, did you purchase any out-of-state products for which you did not pay any California sales tax? *If yes, provide the total amount of untaxed out-of-state purchases. (Note: common untaxed out-of-state purchases include, but are not limited to: internet, mail-order and shopping channel purchases of office products and supplies)*

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## Miscellaneous Questions

- During 2018, if you had a Schedule C (sole proprietorships) or Schedule E (rental properties) business, did you pay \$600 or more to any service provider for which you have not filed Form 1099 for 2018?
- Were you notified or audited by either the Internal Revenue Service or the State taxing agency in 2018 that has not already been brought to the attention of our office?
- During 2018, did you or your spouse make any gifts to an individual that total more than \$15,000, or any gifts to a trust?
- Did your bank account information change within the last twelve months? *If so, please provide updated information in your tax organizer.*
- If you are entitled to a tax refund for 2018 and you are not required to make estimated tax payments, do you want the refund to be automatically deposited to your bank account instead of being issued a check by the government? *If so, please be sure you have provided us with accurate bank account information (see previous question).*
- If you are required to pay a balance due on your tax return for 2018, do you want it to be automatically withdrawn from your bank account through electronic debit instead of having to mail a paper check to the government? *If so, please be sure you have provided us with accurate bank account information (see previous question).*