

2020	1040	US	Miscellaneous Questions
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If any of the following items pertain to you or your spouse for 2020, 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 2020? |

DEPENDENTS

- | | | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Were there any changes in dependents? |
| <input type="checkbox"/> | <input type="checkbox"/> | If any of your dependents are over age 18, were they a full time student in 2020? |
| <input type="checkbox"/> | <input type="checkbox"/> | If any of your dependents are over age 18 and NOT a full time student, was their income (including unemployment compensation) less than \$4,300 in 2020? |
| <input type="checkbox"/> | <input type="checkbox"/> | Are you the custodial parent of all the dependents you are claiming? |
| <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 2020, with interest and dividend income in excess of \$1,100, or total investment income in excess of \$2,200? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you incur any child care expenses required in order to allow you to work? |
| <input type="checkbox"/> | <input type="checkbox"/> | If you are claiming head of household status, please provide the number of days your qualifying dependent lived with you in 2020 _____. |

HEALTH CARE COVERAGE

- | | | |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Did you and your dependents have health care coverage for the full-year? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have health insurance coverage through Covered CA (or any other governmental Marketplace) at any time during 2020? If so, please provide us with a copy of Form 1095-A that was sent to you from Covered CA (or similar Marketplace). |
| <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? If you received an exemption certificate, please attach. |

- | Yes | No | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Did you pay any long-term care premiums during 2020? |

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<input type="checkbox"/>	<input type="checkbox"/>		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) If yes, please provide a copy of Form 1099-SA (distributions) & Form 5498-SA (contributions).
INCOME			
<input type="checkbox"/>	<input type="checkbox"/>		Did you receive unreported tip income of \$20 or more in any month?
<input type="checkbox"/>	<input type="checkbox"/>		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?
<input type="checkbox"/>	<input type="checkbox"/>		Did you receive or pay any alimony during 2020? If yes, please provide us with the date of your divorce decree. _____
<input type="checkbox"/>	<input type="checkbox"/>		Did you receive unemployment compensation during 2020? If yes, provide Form 1099-G.
<input type="checkbox"/>	<input type="checkbox"/>		Did you receive any disability income?
<input type="checkbox"/>	<input type="checkbox"/>		Did you rent out your home, or a portion of it, to someone during 2020? (Note: this includes AirBnB or VRBO type rental activities).
<input type="checkbox"/>	<input type="checkbox"/>		Did you have any foreign income or pay any foreign taxes?
<input type="checkbox"/>	<input type="checkbox"/>		Did you receive an economic impact payment ("stimulus checks")? If so, how much did you receive in the first round? _____ and how much in the second round? _____. Please provide IRS Notice 1444.
<input type="checkbox"/>	<input type="checkbox"/>		Did you receive funds from the Payroll Protection Plan (PPP) or Economic Injury Disaster Loan (EIDL) programs?
PURCHASES, SALES AND DEBT			
<input type="checkbox"/>	<input type="checkbox"/>		Did you start a business during 2020? If yes, provide income, expense and any asset purchase detail.
<input type="checkbox"/>	<input type="checkbox"/>		Did you purchase rental property during 2020? If yes, provide income and expense detail along with the purchase document.
Yes	No		
<input type="checkbox"/>	<input type="checkbox"/>		Did you acquire an interest in a partnership, LLC, S corporation, trust, or estate during 2020? If yes, provide Schedule K-1 issued to you by the organization.
<input type="checkbox"/>	<input type="checkbox"/>		Did you purchase or dispose of any business assets (furniture, equipment, vehicles, real estate, etc.) during 2020, or convert any personal assets to business use? If yes, provide a listing of purchases, disposals & conversions.
<input type="checkbox"/>	<input type="checkbox"/>		Did you buy or sell any stocks, bonds or other investment property in 2020?
<input type="checkbox"/>	<input type="checkbox"/>		Did you buy or sell any "qualified small business stock" in 2020?
<input type="checkbox"/>	<input type="checkbox"/>		Were you granted any restricted stock or did you exercise any stock options during 2020?

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<input type="checkbox"/>	<input type="checkbox"/>		At any time during 2020, did you receive, sell, send, exchange, or otherwise acquire any financial interest in any virtual currency (such as Bitcoins)? If so, provide a complete summary of all related transactions.
<input type="checkbox"/>	<input type="checkbox"/>		Did you collect on any installment contract during 2020?
<input type="checkbox"/>	<input type="checkbox"/>		Did you dispose of any property in 2020 by reason of foreclosure or short-sale?
<input type="checkbox"/>	<input type="checkbox"/>		Did you purchase, sell, or refinance your principal home or second home, or did you take a home equity loan in 2020? If yes, provide the settlement sheet (Closing Disclosure) and Form 1099-S (if applicable).
<input type="checkbox"/>	<input type="checkbox"/>		Do you have a mortgage or home equity loan on your principal residence that is not the original mortgage used to purchase your home AND some portion of the mortgage funds were used for purposes other than making home improvements? If yes, please indicate the amount of mortgage funds that were NOT used for purchase or home improvements.
<input type="checkbox"/>	<input type="checkbox"/>		During 2020, 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).
<input type="checkbox"/>	<input type="checkbox"/>		During 2020, do you have an existing 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.
<input type="checkbox"/>	<input type="checkbox"/>		Did you have any debts canceled, discharged or forgiven in 2020?
<input type="checkbox"/>	<input type="checkbox"/>		Did anyone owe you money on a documented loan which became noncollectable in 2020? If so, please explain.
RETIREMENT PLANS			
Yes	No		
<input type="checkbox"/>	<input type="checkbox"/>		Did you receive a distribution from a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.) during 2020?
<input type="checkbox"/>	<input type="checkbox"/>		If you are under 59 1/2 and took a distribution from a retirement plan, did you take the distribution because you were impacted by COVID-19?
<input type="checkbox"/>	<input type="checkbox"/>		If you received a COVID-19 related retirement plan distribution, do you want to include the income ratably over a three-year period of 2020, 2021 and 2022?
<input type="checkbox"/>	<input type="checkbox"/>		If you received a COVID-19 related retirement plan distribution, did you or do you intend to repay any of the distribution? If so, please provide repayment information.
<input type="checkbox"/>	<input type="checkbox"/>		Did you transfer or rollover any amount from one retirement plan to another retirement plan during 2020?
<input type="checkbox"/>	<input type="checkbox"/>		Did you convert part or all of your traditional, SEP, or SIMPLE IRA to a Roth IRA during 2020?
<input type="checkbox"/>	<input type="checkbox"/>		Did you make a contribution to a retirement plan (IRA, SEP, SIMPLE, Qualified Plan, etc.) for 2020?

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<input type="checkbox"/>	<input type="checkbox"/>		If you are eligible and have not done so, do you want to make a contribution for 2020 to your IRA or self-employed retirement plan? (Note: IRA contributions for 2020 must be made on or before April 15, 2021).
EDUCATION			
<input type="checkbox"/>	<input type="checkbox"/>		Did you receive a distribution during 2020 from an Education Savings Account or a Qualified Tuition Program account (529 Plan)?
<input type="checkbox"/>	<input type="checkbox"/>		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).			
<input type="checkbox"/>	<input type="checkbox"/>		During 2020, did you incur a loss because of stolen property or property damaged by a casualty? If so, please provide details.
<input type="checkbox"/>	<input type="checkbox"/>		Did you work out of town for part of the year and incur business expenses for which you were not reimbursed?
Yes	No		
<input type="checkbox"/>	<input type="checkbox"/>		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?
<input type="checkbox"/>	<input type="checkbox"/>		Do you have a home office that is used exclusively for qualified business purposes?
<input type="checkbox"/>	<input type="checkbox"/>		Did you incur moving expenses during 2020 due to a change of employment?
<input type="checkbox"/>	<input type="checkbox"/>		If you're a K-12 educator, did incur any expenses for professional development courses, books, supplies, computer equipment (including related software and services), other equipment, and supplementary materials that you use in the classroom? Please provide details.
ESTIMATED TAXES			
<input type="checkbox"/>	<input type="checkbox"/>		Do you expect a large fluctuation in your income, deductions or withholding from 2020 to 2021? For example - change in employment, buying/selling real estate, change in marital status. If yes, provide details.
<input type="checkbox"/>	<input type="checkbox"/>		If you are required to make FEDERAL estimated tax payments for 2021, 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 canceled at any time during the year).
<input type="checkbox"/>	<input type="checkbox"/>		If you are required to make CALIFORNIA estimated tax payments for 2021, 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 canceled at any time during the year).
MISCELLANEOUS			

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<input type="checkbox"/>	<input type="checkbox"/>		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)?
<input type="checkbox"/>	<input type="checkbox"/>		Do you want a paper copy of your tax return? Please note that there is a \$10 fee for paper copies.
<input type="checkbox"/>	<input type="checkbox"/>		Do you want to allocate \$3 to the Presidential Election Campaign Fund?
<input type="checkbox"/>	<input type="checkbox"/>		Does your spouse want to allocate \$3 to the Presidential Election Campaign Fund?
<input type="checkbox"/>	<input type="checkbox"/>		May the IRS discuss your tax return with our firm as your tax preparer?
Yes	No		
<input type="checkbox"/>	<input type="checkbox"/>		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.
<input type="checkbox"/>	<input type="checkbox"/>		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 2020?
<input type="checkbox"/>	<input type="checkbox"/>		During 2020, did you have an interest in any foreign assets or accounts exceeding \$50,000 (or \$100,000 if married filing jointly)?
<input type="checkbox"/>	<input type="checkbox"/>		Did you receive a distribution from, or were you the grantor of, or transferor to, a foreign trust?
<input type="checkbox"/>	<input type="checkbox"/>		Did you purchase a new electric or plug-in hybrid vehicle during 2020 that is eligible for a tax credit? If yes, provide the purchase invoice.
<input type="checkbox"/>	<input type="checkbox"/>		Did you engage the services of any household employees during 2020 whereby you paid the household employee wages of \$2,000 or more during 2020? (This does not refer to independent contractors or those employed by an outside agency).
<input type="checkbox"/>	<input type="checkbox"/>		If you were a California resident during 2020, 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).
<input type="checkbox"/>	<input type="checkbox"/>		During 2020, 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).
<input type="checkbox"/>	<input type="checkbox"/>		During 2020, if you had a Schedule C (sole proprietorships) business, did you pay \$600 or more to any service provider for which you have not filed Form 1099 for 2020?
<input type="checkbox"/>	<input type="checkbox"/>		If you are subject to self-employment tax, do you want to defer paying the eligible portion of the self-employment tax?

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<input type="checkbox"/>	<input type="checkbox"/>		Were you notified or audited by either the Internal Revenue Service or the State taxing agency in 2020 that has not already been brought to the attention of our office?
Yes	No		
<input type="checkbox"/>	<input type="checkbox"/>		During 2020, did you or your spouse make any gifts to an individual that total more than \$15,000, or any gifts to a trust?
<input type="checkbox"/>	<input type="checkbox"/>		Did your bank account information change within the last twelve months? If so, please provide updated information in your tax organizer.
<input type="checkbox"/>	<input type="checkbox"/>		If you are entitled to a tax refund for 2020 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).
<input type="checkbox"/>	<input type="checkbox"/>		If you are required to pay a balance due on your tax return for 2020, do you want it to be automatically withdrawn from your bank account through electronic debit instead of mailing a check to the government? If so, please be sure you have provided us with accurate bank account information (see previous question).