

2021

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US

Miscellaneous Questions

If any of the following items pertain to you or your spouse for 2021, please check the appropriate box and provide additional information if necessary.

PERSONAL INFORMATION

Yes

No

Did your marital status change during the year?

Did your address change from what was shown on your prior year return?

Could you be claimed as a dependent on another person's tax return for 2021?

DEPENDENTS

Were there any changes in your dependents?

If any of your dependents are over age 18, were they a full time student in 2021?

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 2021?

Are you the custodial parent of all the dependents you are claiming?

Did you have any children under age 19 or full-time students under age 24 at the end of 2021 with interest and dividend income in excess of \$1,100 or total investment income in excess of \$2,200?

Did you pay for the care of a child to enable you to work?

If you are claiming head of household status, please provide the number of days your qualifying dependent lived with you in 2021: _____.

During 2021, did you receive advance Child Tax Credit payments? If so, please provide details along with IRS Letter 6419.

HEALTH CARE COVERAGE

Did you and your dependents have health care coverage for the full-year? If not covered for the full year, please provide details of months of coverage for taxpayer, spouse, and each dependent.

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Yes No

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.

Did you have health insurance coverage through Covered CA (or any other governmental Marketplace) at any time during 2021? If so, please provide us with a copy of Form 1095-A that was sent to you from Covered CA (or similar Marketplace) and CA Form 3895.

Did you pay any long-term care premiums during 2021?

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

Did you receive unreported tip income of \$20 or more in any month?

Did you receive COBRA premium assistance from your employer? If so, please provide details.

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 or pay any alimony during 2021? If yes, please provide us with the date of your divorce decree: _____

Did you receive unemployment compensation during 2021? If yes, provide Form 1099-G.

Did you receive any disability income during 2021?

Did you rent out your home, or a portion of it, to someone during 2021? (Note: this includes AirBnB or VRBO type rental activities).

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Yes No

 Did you have any foreign income or pay any foreign taxes?

 Did you receive an economic impact payment ("stimulus check") in March 2021 or later in the year? If so, how much did you receive? _____ Please provide IRS Notice 1444-C and Letter 6475.

 During 2021, did you receive funds from the Payroll Protection Plan (PPP) or Economic Injury Disaster Loan (EIDL) programs?

PURCHASES, SALES AND DEBT

 Did you start a business during 2021? If yes, provide income, expense, and any asset purchase detail.

 Did you purchase rental property during 2021? If yes, provide income and expense detail along with the purchase document.

 Did you acquire an interest in a partnership, LLC, S corporation, trust, or estate during 2021? If yes, provide the 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 2021, or convert any personal assets to business use? If yes, provide a listing of purchases, disposals, & conversions.

 Did you buy or sell any stocks, bonds, or other investment property in 2021?

 Did you buy or sell any "qualified small business stock" in 2021?

 Were you granted any restricted stock or did you exercise any stock options during 2021?

 At any time during 2021, did you receive, sell, exchange, or otherwise dispose of any financial interest in any virtual currency (such as Bitcoins)? If so, provide a complete summary of all related transactions.

 Did you collect on any installment contract during 2021?

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Yes No

- Did you dispose of any property in 2021 by reason of foreclosure or short-sale?
- Did you purchase, sell, or refinance your principal home or second home, or did you get a home equity loan in 2021? If yes, provide the settlement sheet (Closing Disclosure) and Form 1099-S and CA Form 593 Real Estate Withholding (if applicable).
- 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.
- During 2021, did you purchase any solar, wind, geothermal or fuel cell energy source equipment 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).
- Did you make any residential energy-efficient improvements to your home such as energy efficient windows, doors or skylights? If so, please provide purchase invoice.
- During 2021, 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.
- Did you have any debts canceled, discharged or forgiven in 2021?
- Did anyone owe you money on a documented loan which became noncollectable in 2021? If so, please explain.

RETIREMENT PLANS

- Did you receive a distribution from a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.) during 2021?
- Did you make a qualified charitable distribution (QCD) directly from your retirement plan to a charity? If so, please provide details.

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Yes No

- If you previously received a COVID-19 related retirement plan distribution, did you repay any of that distribution in 2021? If so, please provide repayment information.
- Did you transfer or rollover any amount from one retirement plan to another retirement plan during 2021?
- Did you convert part or all of your traditional, SEP, or SIMPLE IRA to a Roth IRA during 2021?
- Did you inherit an IRA or qualified retirement plan in 2021?
- Did you make a contribution to a retirement plan (IRA, SEP, SIMPLE, Qualified Plan, etc.) for 2021?
- If you are eligible and have not done so, do you want to make a contribution for 2021 to your IRA or self-employed retirement plan? (Note: IRA contributions for 2021 must be made on or before April 18, 2022).

EDUCATION

- Did you receive a distribution during 2021 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 2021, 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?

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Yes No

Do you have a home office that is used exclusively for qualified business purposes?

Did you incur moving expenses during 2021 due to a change of employment?

If you're a K-12 educator, did you incur any expenses for professional development courses, books, supplies, computer equipment (including related software and services), PPE supplies, or supplementary materials that you use in the classroom? Please provide details.

ESTIMATED TAXES

Do you expect a large fluctuation in your income, deductions or withholding from 2021 to 2022? 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 2022, 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).

If you are required to make CALIFORNIA estimated tax payments for 2022, 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

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 a paper copy of your tax return? Please note that there is a \$10 fee for paper copies.

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?

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Yes	No
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| <input type="checkbox"/> | <input type="checkbox"/> | May the IRS discuss your tax return with our firm as your tax preparer? |
| <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 2021? |
| <input type="checkbox"/> | <input type="checkbox"/> | During 2021, 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 2021 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 2021 whereby you paid the household employee wages of \$2,000 or more during 2021? (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 2021, 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 2021, if you had combined gross receipts in excess of \$100,000 from Schedule C (sole proprietorships) or 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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Yes

No

During 2021, if you had a Schedule C (sole proprietorships) business, did you pay \$600 or more to any service provider?

Were you notified or audited by either the Internal Revenue Service or the State taxing agency in 2021 that has not already been brought to the attention of our office?

During 2021, 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 2021 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 2021, 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).