



## Tax Preparation and Financial Planning Questions

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: _____   | <input type="checkbox"/> | <input type="checkbox"/> |
| 2) Are you planning to claim the same dependents as you did last year?   | <input type="checkbox"/> | <input type="checkbox"/> |
| 3) Are any of your unmarried children, who might be claimed as dependents, 19 years of age or older?<br>If 19 or older, were they full-time students? _____  | <input type="checkbox"/> | <input type="checkbox"/> |
| 4) Did anyone in your household have any tuition expenses?<br>If yes, please provide the Form 1098-T from the school attended.   | <input type="checkbox"/> | <input type="checkbox"/> |
| 5) Did you incur any childcare expenses so that you or your spouse could work or go to school?   | <input type="checkbox"/> | <input type="checkbox"/> |
| 6) Did you make any contributions to an IRA?   | <input type="checkbox"/> | <input type="checkbox"/> |
| 7) Did you take any distributions from a retirement plan (pension, IRA, 401(k), 403(b))? If so, please provide the Form 1099-R   | <input type="checkbox"/> | <input type="checkbox"/> |
| 8) Did everyone in your household have health insurance all year?<br>Do you have health insurance through; Your employer <input type="checkbox"/> Covered CA <input type="checkbox"/> Other <input type="checkbox"/><br>If you selected Covered CA, please provide a copy of the Form 1095-A | <input type="checkbox"/> | <input type="checkbox"/> |
| 9) Did you purchase solar panels for a home or business?   | <input type="checkbox"/> | <input type="checkbox"/> |
| 10) Did you purchase, sell or refinance a home?<br>Please specify: _____ Please provide a copy of your Closing Statement(s).   | <input type="checkbox"/> | <input type="checkbox"/> |
| 11) Did you experience a short sale/foreclosure/loan modification on any properties in 2018?   | <input type="checkbox"/> | <input type="checkbox"/> |
| 12) Did you have any debts cancelled or forgiven (e.g. Forms 1099-C or 1099-A)?  | <input type="checkbox"/> | <input type="checkbox"/> |
| 13) Did you have any bank accounts or other assets outside of the United States over \$10,000 in value?  | <input type="checkbox"/> | <input type="checkbox"/> |
| 14) Did you make any estimated tax payments?<br>If yes, please provide us the amounts and dates of the payments.   | <input type="checkbox"/> | <input type="checkbox"/> |
| 15) Did you purchase any items outside of CA for which you did not pay CA sales tax?   | <input type="checkbox"/> | <input type="checkbox"/> |
| 16) Do you have a non-IRA brokerage account?<br>If so, please provide all pages of the Yearend Tax Statement   | <input type="checkbox"/> | <input type="checkbox"/> |

Client Signature: \_\_\_\_\_ Date \_\_\_\_\_