

Questionnaire - 2021 (1040)

Please check the appropriate box and include all necessary details and documentation.

A. Personal Information

Yes No

1. Did your marital status change during the year?
If yes, explain:
2. Did you live separately from your spouse during the last six months of the year?
3. Do you have a separate decree, instrument, or agreement and are not living in the same household by the end of the year?
4. Did you address change from last year?
5. Can you be claimed as a dependent by another taxpayer?
6. Did you change any bank accounts, or did routing transit numbers (RTN) and/or bank account number change for existing bank accounts that have been used to direct deposit (or direct debit) funds from (or to) the IRS or other taxing authority during the tax year?
7. Did you, your spouse, or any dependents receive an Identity Protection PIN (IP PIN) from the IRS from the or have you been a victim of ID theft? If yes, please provide the IRS letter?
8. Did you reside in or operate a business in a Federally declared disaster area? The Federally declared disaster areas include victims of hurricanes, tropical storms, floods, as well as wildfires.

B. Dependent Information

1. Were there any changes in dependents from the prior year?
If yes, explain
2. Do you have any children under age 19 or a full-time student under age 24 with unearned income in excess of \$2,200?
3. Do you have dependents who must file a tax return?
4. Did you provide over half the support for any other person(s) other than your dependent children during the year?
5. Did you pay for child care while you worked, looked for work, or while a full-time student?
6. Is there any other person(s) who lived with you more than half the year but not claimed by you last year?
7. Did you pay any expenses related to the adoption of a child during the year?
8. If you are divorced or separated with child(ren), do you have a divorce decree divorce decree or other form of separation agreement which establishes custodial responsibilities?

C. Purchases, Sales and Debt Information

1. Did you start a new business or purchase rental property during the year?
2. Did you sell, exchange, or purchase any assets used in your trade or business?
3. Did you acquire a new or additional interest in a partnership or S corporation?
4. Did you sell, exchange, or purchase any real estate during the year?
5. Did you purchase or sell a principal residence during the year?
6. Did you foreclose or abandon a principal residence or real property during the year?
7. Did you acquire or dispose of any stock during the year?
8. Did you take out a home equity loan this year?
9. Did you refinance a principal residence or second home this year?
10. Did you sell an existing business, rental, or other property this year?
11. Did you lend money with the understanding of repayment and this year it become totally uncollectable?
12. Did you have any debts canceled or forgiven this year, such as a home mortgage or student loan(s)?
13. Did you purchase a qualified plug-in electric drive vehicle or qualified fuel cell vehicle this year?

D. Income Information

Yes No

1. Did you have any foreign income or pay any foreign taxes during the year, directly or indirectly, such as from investment accounts, partnerships or a foreign employer?
2. Did you or your spouse have income from extra side-jobs during the year?
3. Did you receive any income from property sold prior to this year or an installment sale?
4. Did you receive any unemployment benefits during the year?
5. Did you receive any disability income during the year?
6. Did you receive any Medicaid waiver payments as difficulty of care during the year?
7. Did you receive tip income not reported to your employer this year?
8. Did any of your life insurance policies mature, or did you surrender any policies?
9. Did you receive any awards, prizes, hobby income, gambling or lottery winnings?
10. Did you receive any income considered to be nonemployee compensation?
11. Did you have any sales or other exchanges of virtual currencies (including from an airdrop or a hard fork), or used virtual currencies to pay for goods or services, or you are holding virtual currencies as an investment?

E. Retirement Information

1. Were you or your spouse an active participant in a pension or retirement plan?
2. Did you, or your spouse, receive any Social Security benefits during the year?
3. Did you or your spouse make any withdrawals from an IRA, Roth, Keogh, SIMPLE, SEP, 401(k), or other qualified retirement plan?
4. If yes, were any withdrawals due to a Federally declared disaster?
5. If you received any qualified disaster retirement plan distributions, did you repay any of the distributions in 2021? If yes, please provide any form(s) 5498 you received.
6. Did you receive any lump-sum payments from a pension, profit sharing or 401(k) plan?
7. Did you make any contributions to an IRA, Roth, Keogh, SIMPLE, SEP, 401(k), or other qualified retirement plan?

F. Covid-19 Information

1. Did you receive an Economic Impact Payment (EIP3 "Stimulus Payment") as reported on Notice 1444-C? If so, how much did you receive?
2. Did you receive an adjustment to your refund or balance due for the exclusion of unemployment compensation and/or Advance Premium Tax Credit as a result of the American Rescue Plan Act (ARPA)?
3. Did you receive advanced Child Tax Credit (CTC) payments in July, August, September, October, November, and December? If yes, please provide IRS letter 6490 showing the amount received.
4. Did you receive a Paycheck Protection Program (PPP) loan?
5. If yes, did you apply for Paycheck Protection Program (PPP) loan forgiveness?
6. Are you a telecommuting employee that was required to "shelter in place" due to local COVID-19 protocols while working in a state that was not your home state?
7. Did you receive emergency leave sick pay?
8. Did you receive emergency family leave wages?
9. Did you receive any special unemployment benefits or compensation under the Coronavirus Relief Act during the year?
10. If you are self-employed, were you unable to perform your self-employed activities due to coronavirus related care you needed?
11. If you are self-employed, were you unable to perform your self-employed activities due to coronavirus related care you provided to your son or daughter under the age of 18?
12. If you are self-employed, were you unable to perform your self-employed activities due to coronavirus related care you provided to another?

G. Health Care Information

Yes No

1. Did you have qualifying health care coverage, such as employer-sponsored coverage or government-sponsored coverage (i.e. Medicare/Medicaid) for your family?
"Your family" for health care coverage refers to you, your spouse if filing jointly, and anyone you can claim as a dependent.
2. Did you enroll for lower cost Marketplace Coverage through healthcare.gov under the Affordable Care Act?
3. Did you enroll for lower cost Marketplace Coverage through healthcare.gov under the Affordable Care Act and share a policy with anyone who is not included in your family?
4. Did you make any contributions to a Health savings account (HSA) or Archer MSA? If yes, please provide any form(s) 5498-A that you received.
5. Did you receive any distributions from a Health savings account (HSA), Archer, MSA, or Medicare Advantage MSA this year? If yes, please provide any form(s) 1099-SA received.
6. Did you pay long-term care premiums for yourself or your family?
7. Did you make any contributions to an ABLE (Achieving a Better Life Experience) account? If yes, please provide any form(s) 5498-QA you received.
8. Did you receive any withdrawals from an ABLE (Achieving a Better Life Experience) account? If yes, please provide any form(s) 1099-QA you received.
9. If you are a business owner, did you pay health insurance premiums for your employees this year? If yes, please provide any form(s) 1099-H you received.
10. Did you receive any Health Coverage Tax Credit (HCTC) advance payments?

H. Itemized Deduction Information

1. Did you incur a casualty or theft loss or any condemnation awards during the year?
2. If yes, did the loss occur in a Federally declared disaster area?
3. Did you pay out-of-pocket medical expenses (co-pays, prescription drugs, etc.)?
4. Did you make any cash or noncash charitable contributions (clothes, furniture, etc.)?
If yes, please provide evidence such as a receipt from the donee organization, a canceled check, or record of payment to substantiate all contributions made.
5. Did you donate a vehicle or boat during the year? If yes, provide Form 1098-C or other written acknowledgment from the donee organization.
6. Did you pay real estate taxes for your primary home and /or second home?
7. Did you pay any mortgage interest on an existing home loan?
If yes, provide any Form(s) 1098 you received.
8. Did you incur interest expenses associated with any investment accounts you held?
9. Did you make any major purchases during the year (cars, boats, etc.)?

I. Miscellaneous Information

1. Did you make gifts of more than \$15,000 to any individual?
2. Do you expect a large fluctuation in income, deductions, or withholding next year?
3. Did you utilize an area of your home for business purposes?
4. Did you engage in any bartering transactions?
5. Did you retire or change jobs this year?
6. Did you incur moving costs because of a permanent change of station as a member of the Armed Forces on active duty?
7. Did you pay any individual as a household employee during the year?
8. Did you make energy efficient improvements to your main home this year?
9. Did you receive a distribution from, or were you a grantor or transferor for a foreign trust?
10. Did you have a financial interest in or signature authority over a financial account such as a bank account, securities account, or brokerage account, located in a foreign country?
11. Do you have any foreign financial accounts, foreign financial assets, or hold interest in a foreign entity?
12. Did you receive correspondence from the State or the IRS?
If yes, explain: _____
13. Do you have previous years of tax returns that are either unfiled or filed with unpaid balances due?
14. Do you want to designate \$3 to the Presidential Election Campaign Fund? If "Yes" it will not change your tax or reduce your refund.
15. If you have an overpayment of 2021 taxes, do you want the excess applied to your 2022 estimated tax (instead of being refunded)?
16. May the IRS discuss your tax return with your preparer?
17. Would you like to make a contribution to any of the charities listed on the California income tax return? A "Yes" will not change your tax or reduce your refund.

J. Education Information

Yes No

1. Did you, your spouse, or your dependents attend a post-secondary school during the year, or plan to attend to attend one in the coming year?
2. Did you have any educational expenses during the year on behalf of yourself, your spouse, or a dependent? If yes, please provide any form(s) 1098-T received.
3. If yes, do you want to add them to this questionnaire?
4. Did anyone in your family receive a scholarship of any kind during the year?
5. If yes, were any of the scholarship funds used for expenses other than tuition, such as room and board?
6. Did you make any withdrawals from an education savings or 529 Plan account? If yes, please provide any form(s) 1098-Q.
7. If yes, were any of these withdrawals rolled over into an ABLE (Achieving a Better Life Experience) account?
8. Did you make any contributions to an education savings or 529 Plan account?
9. Did you pay any student loan interest this year?
10. Did you cash any Series EE or I U.S. Savings bonds issued after 1989?
11. Would you like a worksheet to aid in the completion of a Free Application for Federal Student Aid (FASFA) with the U.S. Department of Education?

K. California Information:

1. Did you make any out-of-state purchases (by telephone, internet, mail or in person) for which the seller did not collect state sales or use tax?
2. If yes, please provide the total amount of such purchases, if any, to report on your return
3. Alternatively, do you want to report use tax to pay with your return using the CA Use Tax Look-Up Table? (this is based on your taxable income.)
4. Below, please provide the following information: Driver's License Number, Issue Date, Expiration Date and the State where the ID was issued. For a faster refund, please provide Driver's License Information for your spouse.

Taxpayer	Spouse
DL Number	DL Number
Issue Date	Issue Date
Expiration Date	Expiration Date
State Issued	State Issued

Special Notes

For web delivery of your tax returns and use electronically, please list your current email address(es):

Preferred

Taxpayer

Spouse

Which email address is preferred for your client portal so we can web deliver your tax returns to you? Please check the taxpayer or spouse box as noted above.

If you wish to opt out of E-Signature or Web Delivery, please check option(s) below:

E-Signature

Web Delivery