

**Client Questionnaire- 2022**

<b>Personal Information</b>	<b>YES</b>	<b>NO</b>
- Are you married?		
- Did your address change in 2022?		
- Can you be claimed as a dependent by another?		
- Did your bank account change from the prior year? <b>(2021 on file)</b>		
<b>Dependent Information</b>		
	<b>YES</b>	<b>NO</b>
- Did you have a new child in 2022? <b>(Fill out new Info on Basic Worksheet)</b>		
- Do you pay for college for yourself or child/children?		
- Do you have any other dependents? <b>(mother, father, relative, etc.)</b>		
- Did any of your dependents have income?		
- Did you pay student loan interest for yourself or child? <b>(Upload 1098-E)</b>		
- Will you or have you contributed to a Coverdell or 529 Plan?		
- Did you maintain a home for someone else other than a dependent?		
- Did you pay for childcare? <b>(Fill out info on Basic Worksheet)</b>		
<b>Purchases, Sales and Debt Information</b>		
	<b>YES</b>	<b>NO</b>
- Did you start or end a business during the year? Sole Proprietorship?		
- Did you acquire an interest in a LLC, Partnership or C Corp or S Corp? <b>(Upload K1)</b>		
- Did you start an LLC or Corporation? <b>(See page 3)</b>		
- Did you buy or sell any real estate? <b>(Upload HUD1 or Closing Statement)</b>		
- Did you sell any stock or mutual funds during the year? <b>(Upload 1099-B)</b>		
- Do you buy Cryptocurrency or Bit Coin?		
- Did you use Cryptocurrency to purchase anything?		
- Did you sell Cryptocurrency or Bit Coin? <b>(Upload 1099-B or pertinent gain/loss info)</b>		
- Did you purchase an Electric or Hybrid clean vehicle? <b>(Upload Purchase Agreement)</b>		
- Did you purchase a hybrid or green appliances? <b>(Upload receipt)</b>		
<b>Income Information</b>		
	<b>YES</b>	<b>NO</b>
- Did you receive any wages or W2s? <b>(Upload W2)</b>		
- Did you receive 1099s? have self-employment income? <b>(Upload 1099-MISC or NEC)</b>		
- Did you receive any interest or dividends? <b>(Upload 1099-INT or 1099-DIV)</b>		
- Did you receive any lump sum distributions from a pension or 401K? <b>(Upload 1099-R)</b>		
- Did you make a withdrawal or roll-over from a retirement plan? <b>(Upload 1099-R)</b>		
- Did you receive any unemployment income? <b>(Upload 1099-G)</b>		
- Did you receive or pay alimony? What year is the divorce agreement? _____		
- Did you have any cancellation of debt? (credit card, mortgage, etc.) <b>(Upload 1099-C)</b>		
- Do you have rental income? <b>(Upload Schedule E Worksheet)</b>		
- Did you receive any awards from lawsuits? <b>(Upload 1099-MISC)</b>		
- Did you receive any Social Security Income? <b>(Upload SSA-1099)</b>		

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<b>Deduction Information</b>		<b>YES</b>	<b>NO</b>
-	Did you incur a casualty or theft loss?		
-	Do you own a home? <b>(Upload 1098 Mortgage Interest Statement)</b>		
-	Did you buy a new home? <b>(Upload HUD1 or Closing Statement)</b>		
-	Do you have a Home Equity Line of Credit? <b>(Upload 1098 Mortgage Interest Stmt.)</b>		
-	Did you pay for PMI? Private Mortgage Insurance?		
-	Did you make any cash/non cash charity donations? <b>(See page 3)</b>		
-	Did you work out of town during the year?		
-	Did you or your dependents go to college? <b>(Upload 1098-T)</b>		
-	Do you have any medical expenses? <b>(See page 3)</b>		
-	Did you pay for long term care premiums?		
-	Do you have a HSA or a MSA? <b>(circle one) (See page 3)</b>		
-	Self employed, did you pay for private healthcare for you or family? <b>(See page 3)</b>		
<b>Credit Information</b>		<b>YES</b>	<b>NO</b>
-	Have you started an adoption process?		
-	Do you have Covered CA insurance? <b>(Upload 1095-A &amp; CA-3895)</b>		
-	Did you or will you start a new retirement plan this year?		
-	Did you make any Quarterly Estimated Payments? <b>see below**</b>		
<b>Misc. Information</b>		<b>YES</b>	<b>NO</b>
-	Are you in the military?		
-	Did you make any gifts more than \$16,000?		
-	Are you covered by a pension plan?		
-	Did you make a SEP, Traditional or Roth IRA contribution? <b>(circle one) (See page 3)</b>		
-	Do you have money in a foreign bank account? <b>(See page 3)</b>		
-	Do you expect any significant changes in the next year? <b>(please explain)</b>		
	Upload all correspondence from the IRS and the FTB.		
-	Do you want to file electronically?		
<b>Stimulus And Estimated Quarterly Info</b>		<b>YES</b>	<b>NO</b>
*	Did you receive the Middle Class Tax refund or the "Gas Refund"?		
*	How much was it? <b>(Upload the 1099-G from CA)</b>		
		<b>Federal</b>	<b>CA</b>
**	How much did you pay for Q1 (due 4/18/22)		
**	How much did you pay for Q2 (due 6/15/22)		
**	How much did you pay for Q3? (due 9/15/22)		
**	How much did you pay for Q4? (due 1/15/23)		

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<b>Deduction Information</b>		
<b>Purchases, Sales and Debt Information</b>		
-	Did <b>YOU</b> start an LLC or Corporation? Are you the only shareholder/Partner?	<b>Yes or No</b>
-	Entity Name:	
-	Address:	
-	EIN:	

<b>Purchases, Sales and Debt Information</b>	
	<b><i>Donations under \$250. Use separate sheet for more than 3 donations.</i></b>
-	Cash Donation
-	Cash Donation
-	Cash Donation
	<b><i>Any donations over \$250 please upload donation letter. (Required)</i></b>
	<b><i>Non Cash Donations</i></b>
-	Name of Organization
-	Address of Organization
-	Description of Donated Items
-	Original Purchase Cost
-	Today's Approx. Thrift Store Value

<b>Medical/Dental Expenses</b>	
-	Doctor, Dentist, Hospital Fees
-	Insurance Premiums (do not include if you have a 1095-A, Covered CA)
-	Medical Aids (Glasses, Contacts, Hearing Aids)
-	Parking Fees & Tolls
-	Prescription Medicines & Drugs
-	Medical Miles Driven

-	HSA or a MSA (Circle what applies) Single or Family plan?
-	Contribution Amount
-	Did you make a SEP, Traditional or Roth IRA contribution ( <b>circle one</b> )
-	Contribution Amount and Date

<b>Further explanations:</b>	
-	How much money do you have in a foreign account? (Upload 12/31/22 Bank Statement)
-	How much did you pay for Health Care Premiums for you and your family?
other-	
other-	
other-	