Questionnaire

Personal Information	Y	N
Can you be claimed as a dependent by another taxpayer?	☐	☐
Did your marital status change during the year? If yes, explain:______________________________	☐	☐
Did you change any bank accounts that have been used to direct deposit (or direct debit)? Act # ______ Rtg # ______	☐	☐
Did you, your spouse, or any dependents receive an Identity Protection PIN (IP PIN) from the IRS or have you been a victim of identity theft? Attach the IRS letter.	☐	☐
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.	☐	☐
Do you want to designate $3 to the Presidential Election Campaign Fund? If you check yes, it will not change your tax or reduce your refund.	☐	☐

Dependent Information	Y	N
Were there any changes in dependents from the prior year? If yes, explain:____________________	☐	☐
Do you have any children under age 19 or a full-time student under age 24 with unearned income in excess of $1,150?	☐	☐
Do you have dependents who must file a tax return?	☐	☐
Did you provide over half the support for any other person(s) other than your dependent children during the year?	☐	☐
Did you pay for child care while you worked, looked for work, or while a full-time student?	☐	☐
Did you pay any expenses related to the adoption of a child during the year?	☐	☐
If you are divorced or separated with child(ren), do you have a divorce decree or other form of separation agreement which establishes custodial responsibilities?	☐	☐

Miscellaneous Information	Y	N
Did you make gifts of more than $16,000 to any individual?	☐	☐
Are you self-employed and did you utilize an area of your home for business purposes?	☐	☐
Did you engage in any bartering transactions?	☐	☐
Did you pay any individual as a household employee during the year?	☐	☐
Did you make energy efficient improvements to your main home this year?	☐	☐
Did you receive a distribution from, or were you a grantor or transferor for a foreign trust?	☐	☐
Did you receive a gift or inheritance from a foreign person in excess of $100,000?	☐	☐
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?	☐	☐
Do you have any foreign financial accounts, foreign financial assets, or hold interest in a foreign entity?	☐	☐
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?	☐	☐

Health Care Information	Y	N
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. If yes, attach any Form(s) 1095-B and/or 1095-C you received.	☐	☐
Did you enroll for lower cost Marketplace Coverage through healthcare.gov (or through Covered California) under the Affordable Care Act and/or share a policy with anyone who is not included in your family?	☐	☐
Did you make any contributions to a Health savings account (HSA) or Archer MSA?	☐	☐
Did you receive any distributions from a Health savings account (HSA), Archer MSA, or Medicare Advantage MSA this year?	☐	☐
Did you pay long-term care premiums for yourself or your family?	☐	☐
If you are a business owner, did you pay health insurance premiums for your employees this year?	☐	☐
Did you receive any Health Coverage Tax Credit (HCTC) advance payments? Attach any Form(s) 1099-H you received.	☐	☐

Questionnaire

Income Information	Y	N
Did you receive any unemployment or disability benefits during the year?	☐	☐
Did you receive a California Middle Class Tax Refund? If so, please list amount: ____________	☐	☐
Did you receive tip income not reported to your employer this year?	☐	☐
Did you receive any awards, prizes, hobby income, gambling or lottery winnings?	☐	☐
Did you receive any self-employment income?	☐	☐
Do you expect a large fluctuation in income, deductions, or withholding next year?	☐	☐
Did you have any Crypto, NFT or other virtual currency transactions during the year (including from an airdrop or a hard fork, or use virtual currencies to pay for goods or services)?	☐	☐

Purchases, Sales and Debt Information	Y	N
Did you start a new business, purchase rental property during the year?	☐	☐
Did you sell, exchange, or purchase any assets used in your trade or business?	☐	☐
Did you receive any income from property sold prior to this year?	☐	☐
Did you foreclose or abandon a principal residence or real property during the year?	☐	☐
Did you take out a home equity loan this year, or refinance a loan? If so, please provide escrow statements.	☐	☐
Did you sell an existing business, rental property, real estate, or other property this year?	☐	☐
Did you have any debts canceled or forgiven this year, such as a home mortgage, student loan(s), or credit card debt? Attach form 1099-C.	☐	☐
Did you purchase a qualified plug-in electric drive vehicle or qualified fuel cell vehicle this year?	☐	☐

Retirement Information	Y	N
Did you receive any Social Security benefits during the year?	☐	☐
Did you make any withdrawals from an IRA, Roth, myRA, Keogh, SIMPLE, SEP, 401(k), or other qualified retirement plan?	☐	☐
If yes, were any withdrawals due to a Federally declared disaster or COVID-19?	☐	☐

Retirement Information Cont.	Y	N
If you received any 2020 qualified disaster retirement plan distributions, did you repay any of the distributions in 2022?	☐	☐
Did you make any contributions to an IRA, Roth, myRA, Keogh, SIMPLE, SEP, 401(k), or other qualified retirement plan?	☐	☐

Education Information	Y	N
Did you have any educational expenses during the year on behalf of yourself, your spouse, or a dependent? Attach Form(s) 1098-T and receipts for qualified tuition and related expenses.	☐	☐
Did anyone in your family receive a scholarship of any kind during the year?	☐	☐
If yes, were any of the scholarship funds used for expenses other than tuition, such as room and board?	☐	☐
Did you make any withdrawals from an education savings or 529 Plan account?	☐	☐
If yes, were any of these withdrawals rolled over into an ABLE (Achieving a Better Life Experience) account?	☐	☐
Did you make any contributions to an education savings or 529 Plan account?	☐	☐
Did you pay any student loan interest this year?	☐	☐

Itemized Deduction Information	Y	N
Did you incur a casualty or theft loss or any condemnation awards during the year?	☐	☐
If yes, did the loss occur in a Federally declared disaster area?	☐	☐
Did you pay out-of-pocket medical expenses (Co-pays, prescription drugs, etc.)?	☐	☐
Did you make any cash or non-cash charitable contributions (clothes, furniture, etc.)? Cash total:____________________________ Non-cash total:_________________________ Dates & Organizations if over $250:__________ _____________________________________	☐	☐
Did you donate a vehicle or boat during the year? Attach Form 1098-C or other written acknowledgment from the donee organization.	☐	☐
Did you pay real estate taxes for your primary home and/or second home?	☐	☐
Did you pay any mortgage interest on an existing home loan? Attach all Form(s) 1098.	☐	☐

Questionnaire

Itemized Deduction Information Cont.	Y	N
Did you incur interest expenses associated with any investment accounts you held?	☐	☐
Did you make any major purchases during the year (cars, boats, etc.)?	☐	☐

Questions and Notes for your Preparer:

Contact Information:

Name(s): ______________________________________

____

Email(s): ______________________________________

____

Address: ______________________________________

City, State, Zip: _______________________________

Home Phone: ___________________________________

Cell Phone: ____________________________________

Engagement Letter

This letter is to confirm and specify the terms of our engagement with you and to clarify the nature and extent of the services we will provide. In order to ensure an understanding of our mutual responsibilities, we ask all clients for whom returns are prepared to confirm the following arrangements.

We will prepare your federal and state income tax returns from information which you will furnish to us. We will not audit or otherwise verify the data you submit, although it may be necessary to ask you for the clarification of some of the information. We will furnish you with questionnaires and worksheets to guide you in gathering the necessary information. Your use of such forms will assist in keeping the fee to a minimum.

It is your responsibility to provide all the information required for the preparation of complete and accurate returns. You should retain all the documents, canceled checks and other data that form the basis of income and deductions. These may be necessary to prove the accuracy and completeness of the returns to a taxing authority. You have the final responsibility for the income tax returns and, therefore, you should review them carefully before you sign them.

Our fee for the preparation of your returns will be based upon a combination of charges for time spent, and charges for forms required. All invoices are due and payable upon presentation. Tax returns cannot be filed electronically until our fee is paid in full. Payments for our fee can be in the form of cash, check or credit card (MC or VISA).

Your returns may be selected for review by the taxing authorities. Any proposed adjustments by the examining agent are subject to certain rights of appeal. In the event of such government tax examination, we will be available upon request to represent you and will render additional invoices for the time and expenses incurred.

If the foregoing fairly sets forth your understanding, please sign this letter and bring it in with you to your appointment, or include it if you mail in your papers.

Signature: ____________________________________

Printed Name: _________________________________

Date: ____