

BOTTOM LINE
(209) 984-1040
2021 Tax Information

The following questions help me understand your tax situation. If you are filing jointly, each question also applies to your spouse. Please answer each question with a yes (Y) or no (N). If a question does not pertain to you, please answer it with a no. If you are a new client, please fill out the "New Client Information" sheet and provide a copy of your tax return from last year.

- 1) ___ Do you have an e-mail address? If yes, please provide _____
- 2) ___ Did you and your dependents have health care coverage for the full year? (please initial)
___ All household members covered under private/employer plan, Medical or Medicare.
___ All household members covered through the Insurance Marketplace (Covered California) **Please include form 1095-A** and income amounts from all dependents.
- 3) ___ If you are getting a refund would you like it directly deposited? If "yes" please initial.
___ Use same account as last year.
___ You will provide bank information (cancelled check).
- 4) ___ Has there been a change in your address, phone number, marital status, people living with you or people that you support?
- 5) ___ Did any of your dependents under age 19 (24 if a college student) have unearned income (e.g. interest or dividends) of over \$2,200?
- 6) ___ At any time during 2021, did you receive, sell, exchange or otherwise dispose of any interest in any virtual currency?
- 7) ___ Did you incur child care or dependent care expenses in order to go to work or school? Include name, address, phone number, amount paid and EIN/SSN of the provider. (Refundable on your 2021 Federal return.)
- 8) ___ Did you pay education expenses for yourself or any dependents for post-secondary education? Please bring the 1098-T (required) from the school and provide the amount of tuition, books and supplies on the "Due Diligence" worksheet.
- 9) ___ Did you sell or trade any assets (e.g. stocks)?
- 10) ___ Are you reporting any gambling winnings for 2021?
If yes, amount of gambling losses in 2021 \$_____.
- 10) ___ Did you make any large purchases (especially a motor vehicle or boat)? If you itemize, the sales tax paid on these items may be a better option.
- 11) ___ Did you contribute to or roll over/convert funds to a traditional or Roth IRA?
- 12) ___ Did you receive or pay any alimony? Date of original divorce or separation agreement _____.
- 13) ___ Did you have any moving expenses?
- 14) ___ Did you contribute to or receive a distribution from a Health Savings Account? Please include form 1099SA. This shows any distributions you took from the account.
- 15) ___ Do the loan(s) on your current home(s) include any amounts that were not used to buy or improve your property? If yes, please have the details as we may have to allocate your deductible mortgage interest.
- 16) ___ Did you have purchasing, selling, refinancing, financing or foreclosing transactions on your personal residence or any other real estate? If yes, provide the settlement document (HUD-1), Form 1099-S, Form 1099C, Form 1099-A or other related documentation.
- 17) ___ Did you have any debt that was cancelled in 2021? (i.e. debt that you owed to a creditor that you are no longer required to pay.) If yes, provide Form 1099-C, Form 1099-A or other documentation.
- 18) ___ Did you make any gifts directly or through a trust which exceeded \$15,000 per person?
- 19) ___ Did you pay more than \$2,300 in 2021 to any one household employee? If yes, federal employment taxes due can be reported and paid on your tax return.

- 20)___ Did you have any interest in, signature or other authority over a bank, securities, or other financial account in a foreign country? Do you own any assets with a fair market value of over \$50,000 in a foreign country? Did you receive a foreign inheritance of \$100,000 or more?
- 21)___ Has the IRS or Franchise Tax Board made you aware or are you aware of any changes to your income, deductions and credits reported on any prior year's tax return?
- 22)___ Have you purchased anything on-line or in another state and not paid your resident state sales tax. Any amount due can be paid with your California return.
- 23)___ Have you received any bartering (trading your services for someone else's services or something of value) income in 2021? Any bartering income is required to be included on your return.
- 24) ___ If you are self-employed, did you pay any health or long-term care insurance premiums.
_____ If yes, were either you or your spouse eligible to participate in an employer-sponsored health or long-term care insurance plan?
- 25) ___ Did you receive any grants or other monetary amounts related to COVID or other reasons. Sometimes these amounts are taxable.
- 26)___ If you are self-employed, did you obtain a Paycheck Protection Program (PPP) loan?
- 27)___ If you are self-employed, did you have to take any time off due to corona virus?
- 28)___ Did you receive any advance child tax credit in 2021? Please **include Letter(s) 6419** with your information.
- 29)___ Would you like to authorize me to discuss your return with the IRS?
- 30)___ Did you made any energy efficient improvements to your home (e.g. new windows, insulation or solar) or buy an electric car?
- 31) ___ Did you pay rent in California for at least half the year in 2021?
- 32)___ Did you make any cash donations to a qualified charity in 2021? \$300 (\$600 on a joint return) can be deducted in 2021 without having to itemize. Amount \$ _____
- 33)___ Did you receive the third Economic Impact (Stimulus) Payment? Please **include Letter 6475** with your information.
_____ Amount received. \$1,400 per person on your 2020 return is most common.

What is your physical address and county?

Address:_____ County:_____

Please provide your driver's license information (not required):

State:_____ License #_____ Issue Date_____ Exp. Date_____

Spouse (if applicable) driver's license information.

State:_____ License #_____ Issue Date_____ Exp. Date_____

I/We have answered the above questions accurately and truthfully.

Signature and Date

Signature and Date

Best phone number to reach you: _____