

Please answer each of the following questions and provide any additional information, if available, for questions answered "Yes".

1. Did any births, adoptions, marriages, divorces, or deaths occur in your immediate family last year? Yes No
2. Will the address on your current returns be different from that shown on your prior year returns? Yes No
3. Were there any changes in dependents from the prior year? Yes No
4. Are you entitled to a dependency exemption due to a divorce decree? Yes No
5. Did any of your dependents have income of \$5050 or more (\$400 if self-employed)? Yes No
6. Did any of your children under age 19 have investment income (stocks, dividends, etc) over \$2,600? Yes No  
If yes, do you want to include your child's income on your return? \_\_\_\_\_
7. Are any dependent children married and filing a joint return with their spouse? Yes No
8. Did any dependent child 19 – 23 years of age attend school less than 5 months during the year? Yes No
9. Did you receive income from any legal proceedings, cancellation of student loans or other indebtedness during the year? Yes No
10. Did you make any gifts during the year directly or in trust exceeding \$19,000 per person? Yes No
11. Did you have any interest in, or signature, or other authority over a bank, securities, or other financial account in a foreign country? Yes No
12. Were you the grantor, transferor, or beneficiary of a foreign trust? Yes No
13. At any time during tax year, did you: (a) receive (as a reward, award, or compensation); or (b) sell, exchange, gift, or otherwise dispose of a digital asset (or a financial interest in a digital asset)?  
This is virtual currency. I will need a copy of the year end statement you received. Yes No
14. Were you a resident of, or did you have income in, more than one state during the year? Yes No  
If yes, which state(s)? \_\_\_\_\_
15. Did you receive any distribution from an IRA or other qualified plan that was partially or totally rolled over into another IRA or qualified plan within 60 days of the distribution (Form 1099R)? Yes No
16. Did you receive an IRA distribution that you did not roll over? If yes, provide details (Form 1099R) Yes No
17. Did you "convert" IRA funds into a Roth IRA? If yes, please provide details. (Form 1099R) Yes No
18. Did you receive any disability payments this year? Yes No
19. Did you receive tip income not reported to your employer? Yes No
20. Did you collect on any installment contract(s) during the year? Yes No
21. Did you receive tax-exempt interest or dividends not reported on Forms 1099-INT or 1099-DIV? Yes No

22. Did you have any securities that became worthless or loans that became uncollectible? Yes No  
23. Did you receive unemployment compensation? (Form 1099-G). Yes No  
24. Did you acquire any interest in partnerships, LLCs, S corporations, estates or trusts this year? Yes No  
25. Did you surrender any U.S. savings bonds? Yes No  
26. Did you start a business? Yes No

27. Do you have detailed records to support business, meal, and travel expenses? The law requires that adequate records be maintained for travel and gift expenses. The documentation should include amounts, time and place, date, business purpose, description of gift(s) (if any) and business relationship of recipient(s).

**NOTE:** With the new tax law, no deduction is permitted for an activity generally considered to be entertainment, amusement, or recreation. Yes No

28. Did you purchase rental property? Yes No

29. If you own rental property, please answer the following:

a) How many days was it used as a rental? \_\_\_\_\_ b) How many days for personal use? \_\_\_\_\_

30. Did you sell rental property? Yes No

31. Did you sell and/or purchase a principal residence or other real estate? If yes, provide Form 1099-S. Yes No

32. Did you refinance your primary mortgage or take out a home equity line of credit in excess of \$100,000? Yes No

a) If yes, did you use any of the proceeds for other than improving your personal residence? Yes No

b) Please explain: \_\_\_\_\_

**Please be sure to include a copy of your settlement statement if you answered yes to questions 30 through 32.**

33. Did you incur expenses as an elementary or secondary educator? If so, how much? \_\_\_\_\_ Yes No

34. Did you make any energy-efficient improvements (remodel or new construction) to your home? If yes, what type?

\_\_\_\_\_ For HVAC, will need PIN or QM Code Yes No

35. Did you make any large purchases or home improvements? Yes No

36. Did you pay real estate taxes on your principal residence? Yes No

If so, how much? \_\_\_\_\_

37. Did you make any contributions /gifts over \$250? Yes No

If yes, do you have written documentation from the organization? Yes No

38. Did you have foreign income, pay any foreign taxes, or file any foreign information reporting or tax return forms? Yes No

39. Do you wish to have \$3 (or \$6 on a join return) of your taxes applied to the Presidential Campaign Fund?	Yes	No
40. Do you wish to contribute to any state fund(s)? If yes, indicate amount(s) and which fund(s):	Yes	No
41. Did you make any contributions to a 529 plan?	Yes	No
a) If yes, to which state plan did you make the contribution, the amount, and beneficiary?		
42. Do you expect a large fluctuation in your income, deductions or withholding next year?	Yes	No
43. Do you want any overpayment of taxes applied to next year's estimated taxes?	Yes	No
44. Do you want any federal refund deposited directly into your bank account?	Yes	No
a) Do you want any balance due directly withdrawn from this same bank account on the due date?	Yes	No
b) Do you want next year's estimated taxes withdrawn from this same bank account on the due dates?	Yes	No
45. If you owe federal tax upon completion of your return, are you able to pay the balance due?	Yes	No
46. Do either you or your spouse have any outstanding child or spousal support payments or federal debt?	Yes	No
47. Has the IRS, or any state or local taxing agency, notified you of changes to a prior year tax return?	Yes	No
48. Are you aware of any changes to your income, deductions and/or credits reported on any prior year return?	Yes	No
49. Can the Internal Revenue Service discuss questions about this return with the preparer?	Yes	No