

Thorough but Important Tax Questionnaire

(Help us know what we don't know)

Please answer the following questions and submit details for any question answered "Yes":

Yes No

1. Did any births, adoptions, marriages, divorces, or deaths occur in your family last year? If yes, provide details, including the final divorce date. _____
2. Will the address on your current returns be different from that shown on your prior year returns? If yes, provide the new address and date moved in the Details section on page 4. _____
3. Were there any changes in dependents from the prior year? If yes, provide details. _____
4. Do you share/alternate deductions for dependents due to a divorce decree? If yes, provide details. _____
5. Did any of your dependents have income of \$1,100 or more from a job? Or \$400 if self-employed? _____
6. Did any of your children under age 19 (or age 24 if they are a full-time student) have investment income over \$2,200?
If yes, do you want to include your child's income on your return? _____
7. Are you providing over half the support for any children who are married and filing a joint return with their spouse? _____
8. Did any dependent child 19-23 years of age attend school full-time for less than 5 months during the year? _____
9. Did you receive income from any legal proceedings, cancellation of student loans or other indebtedness during the year? If yes, provide details. _____
10. Did you make any gifts during the year exceeding \$15,000 per person? _____
11. Did you receive, sell, exchange, or otherwise dispose of any financial interest in any virtual currency? _____
12. Did you have any interest in, or signature, or other authority over a bank, securities, or other financial account in a foreign country?
If yes, check the box if the account had greater than \$10,000 at any point during the tax year: _____
13. Were you the grantor, transferor or beneficiary of a foreign trust? _____
14. Were you a resident of, or did you have income from, more than one state during the year? _____
15. Do you wish to have \$3 (or \$6 on joint return) of your taxes applied to the Presidential Campaign Fund? _____
16. Do you wish to contribute to any state fund(s)? If yes, indicate amount(s) and which fund(s): _____



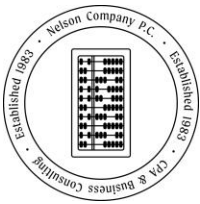
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Yes No

- 17. Do you want any overpayment of taxes applied to next year's estimated taxes? _____
- 18. Do you want any federal or state refund deposited directly into your bank account? - Check the box to use the same bank as was listed on last year's return. If it is a new bank, please provide a voided check. _____
- 19. Do either you or your spouse have any outstanding child or spousal support payments or federal debt? _____
- 20. Do you expect a large fluctuation in your income, deductions or withholding next year? If yes, provide details. _____
- 21. 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 1099-R) _____
- 22. If you received an IRA distribution, which you did not rollover, provide details and Form 1099-R. _____
- 23. Did you "convert" IRA funds into a Roth IRA? If yes, provide details and Form 1099-R _____
- 24. Did you receive any disability payments this year? _____
- 25. Did you receive tip income not reported to your employer? _____
- 26. Did you sell or purchase a principal residence or other real estate? If yes, provide the settlement sheet(s) (HUD-1). _____
- 27. Did you collect on any installment contract during the year? Provide details. _____
- 28. Did you receive tax-exempt interest or dividends not reported on Forms 1099-INT or 1099-DIV? _____
- 29. During this year, do you have any stocks that became worthless or business loans that became uncollectible? _____
- 30. Did you receive unemployment compensation? If yes, provide Form 1099-G. _____
- 31. Did you receive, or pay, any alimony during the year? If yes, provide details, including the divorce settlement date and the amount paid and/or received. _____
- 32. Did you have any casualty or theft losses during the year? If yes, provide details. _____
- 33. Did you have foreign income, pay any foreign taxes, or file any foreign information reporting or tax return forms? Provide details. _____
- 34. If there were dues paid to an association, was any portion not deductible due to political lobbying by the association or benefits received? _____



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Yes No

- 35. Did you, or do you plan to contribute before April 15, to a traditional IRA, or Roth IRA for last calendar year? If yes, provide details. _____ _____

- 36. Did you, or do you plan to contribute before April 15 to a health savings account (HSA) for last calendar year? If yes, provide details. _____ _____

- 37. Did you receive any distributions from a health savings account (HSA)? If so, provide details and Forms 1099-SA and 5498-SA _____ _____

- 38. Has the IRS, or any state or local taxing agency, notified you of changes to a prior year's tax return? If yes, provide copies of all notices or correspondence received. _____ _____

- 39. Are you aware of any changes to your income, deductions and credits reported on any prior years' returns? _____ _____

- 40. Did you purchase gasoline, oil, or special fuels for non-highway use vehicles? - This is referencing a special credit that is rare for most people to be eligible for. _____ _____

- 41. Did you purchase an energy-efficient or other new vehicle? If yes, provide purchase invoice. _____ _____

- 42. If you, or your spouse, have self-employment income, did you pay any health insurance premiums or long-term care premiums? _____ _____

- 43. Were either you or your spouse eligible to participate in an employer's health insurance or long-term care plan? _____ _____

- 44. If you, or your spouse, have self-employment income, do you want to make a retirement plan contribution? _____ _____

- 45. Were you granted or did you exercise any stock options? If yes, provide details. _____ _____

- 46. Were you granted any restricted stock (RSUs)? If yes, provide details. _____ _____

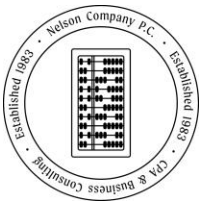
- 47. Did you pay any household employee over age 18 wages of \$2,300 or more? If yes, provide a copy of Form W-2 issued to each household employee. If yes, did you pay total wages of \$1,000 or more in any calendar quarter to all household employees? _____ _____

- 48. Did you surrender any U.S. savings bonds? _____ _____

- 49. Did you use the proceeds from Series EE U.S. savings bonds purchased after 1989 to pay for higher education expenses? _____ _____

- 50. Did you realize a gain on property which was taken from you by destruction, theft, seizure or condemnation? _____ _____

- 51. Did you start a business? _____ _____



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Yes No

- 52. Did you purchase rental property? If yes, provide the settlement sheet(s) (HUD-1). _____

- 53. Did you acquire any interests in partnerships, LLCs, S-Corporations, estates or trusts this year?
If yes, provide Schedule K-1 that the Organization has issued to you. _____

- 54. Do you have records to support travel, entertainment, or gift expenses with regards to unreimbursed employee expenses or business expenses? The law requires that adequate records be maintained for travel, entertainment, and gift expenses. The documentation should include amount, time and place, date, business purpose, description of gift(s) (if any), and business relationship of recipient(s). _____

- 55. Did you incur expenses as an elementary or secondary educator? If so, how much? _____

- 56. Did you make any energy-efficient improvements (remodel or new construction) to your home? _____

- 57. Can the Internal Revenue Service and state tax authority discuss questions about this return with the preparer? _____

- 58. If you live in a state with sales tax, did you make any large purchases or home improvements? _____

- 59. Did you receive the 3rd stimulus payment for 2021 (between approximately 3/10/21 - 12/31/21)? _____

- 60. If you received, or were eligible to receive, Advanced Child Tax payments between July and December of 2021, please provide IRS Letter 6419, which would have been sent to you between mid-December 2021 and January 2022. _____

- 61. If you received health insurance through [HealthCare.gov](https://www.healthcare.gov), please provide Form 1095-A from your online [HealthCare.gov](https://www.healthcare.gov) account. _____



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Yes No

Additional Details:
