Taxpayer _____ Tax Year _____

TAX INTERVIEW GUIDE			
Please answer questions for the current tax year only unless otherwise requested.			
Purpose: To ensure we've asked all appropriate questions as required by the IRS and your state tax agency and to			
help us get the best results for your tax return.			
Check Y or N for <u>all questions</u> . For all "yes" answer see the " Documents needed " column to see what information we will need to properly complete your return.	YN	Documents needed	
Personal Information			
Marital status on 12/31/2			
Did your marital status change? If yes, please explain		Divorce decree(s) Marriage certificate	
Did you change your name with Social Security?		Bring new SS card	
ID verification: Social Security card (if not on file); current driver's license or state ID		SS card for everyone	
(if not on file or expired) REQUIRED for e-file authorization		DL/ID copy (TP & SP)	
Do you want to allow your advisor to discuss this year's return with the IRS (if needed)?			
Do you want to allow someone <u>other than your preparer</u> to discuss this year's return with the IRS?			
Designee's name Phone number Designee's PIN)			
		Dhysisian statement(s)	
Were you, your spouse, or any dependent(s) permanently and totally disabled? Date of death (if this tax year): Taxpayer Spouse		Physician statement(s) Death certificate	
Were you or your spouse active duty military at any time during this tax year? State of domicile		LES; TDS; POC	
Did you change residences during the year for a job or business connected purpose?		LES, TDS, FOC	
Did the IRS send you an Identity Protection Number (IP PIN)?		Please provide	
Have we prepared your return(s) before?		Prior 5 years tax returns	
Dependent Information SKIP THIS SECTION IF YOU HAVE NO DEPENDENTS		There you're tax rotaine	
Dependents under 17 (questions must be answered for each dependent)			
Did your dependent live with you all year?		If no, explain	
Did your dependent provide more than 1/2 his/her own support?		If yes, explain	
Dependents 17 and older (questions must be answered for each dependent)			
Did your dependent live with you all year?		If no, explain	
Did your dependent provide more than 1/2 his/her own support?		If yes, explain	
Was any dependent married at the end of the year?			
If yes, did (or will) the dependent file a joint tax return?			
Do you have a dependent without a SS# or ITIN?		Identity docs	
Did you provide more than 1/2 the support for anyone you can claim as a dependent?			
Did you provide more than 1/2 the support for anyone other than your current dependents?			
Do you have dependents who must file a return?			
If yes, do you want us to prepare their return(s)?		Social Security #	
Do you have dependents under age 19 (under 24 and full time students) with ONLY interest and/or dividend income?		Child's 1099-INT and/or 1099-DIV	
If yes, do you want to include their interest and/or dividend income on your tax return?			
Have you received Aid to Families with Dependent Children?		Payment records	
Are any of your dependents not US citizens or residents?		ITIN	
Did you pay any adoption expenses during the year?		Payment statements	
Are you claiming a dependent but you are not the custodial parent?		Form 8332	
Did you pay for child care while you worked or looked for work?		Payments for each	
Did you pay for child care because of a disabled spouse?		-dependent	
Provider's name, address, TIN and phone number			
General Income			
Did you receive a W-2?		W-2 (all copies)	
Did you receive tips in your employment that you <u>did not report</u> to your employer?		Tip records	
Did you receive interest income (banks, credit unions, brokerage accounts, or installment sales, etc.)?		1099-INT or year-end	
Interest is taxable even if you don't receive a 1099-INT form		statements	
Did you receive dividend income from brokerage accounts, stocks, mutual funds, etc.? Dividends are taxable even if you don't receive a 1099-DIV form		1099-DIV or year-end statements	
Did you receive tax-exempt interest or dividends from mutual funds?		Mutual Fund info pages	
		mataan ana ino payos	

Check Y or N for <u>all questions</u> . For all "yes" answer see the " Documents needed " column to see	Y	Ν	Documents
what information we will need to properly complete your return.		<u> </u>	needed
Did you have a Health Savings Account (HSA) through your employer or from a privately owned plan?		<u> </u>	HSA year end statement
If yes, did you receive any distributions from your HSA plan?		<u> </u>	Form 1099-SA
Did you receive a tax refund from your California or other state income return?		<u> </u>	1099-G
Did you receive alimony/spousal support? If yes - name and SS# of the payer			Divorce decree &
Date of divorce or most recent modification		<u> </u>	payment records
Did you have income from hobbies?		<u> </u>	Income records
Did you sell any items that were used in business or rental property activities?		<u> </u>	Sales records
Did you sell stocks, bonds, mutual funds or other investments?			1099-B; brokerage stmts
Other Income Items		_	
Did you have income/expenses from self-employment? (Amway, Mary Kay, Airbnb, Lyft, Uber, etc.)			1099 forms; P&L
Do you have written record of business miles for each business vehcile?			Mileage log(s)
Did you pay for services to anyone who is not a corporation? Form 1099 may be required			
Did you use Employee Retention Credit to reduce payroll tax payments?			Payroll reports
Did you receive funds from PPP or EIDL?			All loan documents
Did you claim forgiveness from PPP loan?			Form 3508
Were you unable to work due to Covid19 care you needed?			Days of care
Were you unable to work due to Covid19 care you provided to family?			Days of care for family
Did you receive income from rental property?			1099-MISC; P&L
Did you receive income from royalties (oil & gas, book sales, timber, etc.)?			1099-MISC; statements
Did you receive a K-1 from a trust or estate, partnership, or S Corporation?			K-1 (all pages)
Did you operate a farm (by yourself or with other family members)?			Profit/loss statement
Did you receive income from marijuana sales?			P&L records
Did you receive income from renting farm property to someone who operated a farm?			Rental income; expenses
Did you receive unemployment (regular or PUA (Pandemic Unemployment Assistance)?			1099-G
Did you receive Social Security benefits?			SSA-1099
Did you have any debt cancelled (mortgages, credit cards, personal loans, student loans, etc.)?			1099-C or 1099-A
Did you receive distributions from a Coverdell Education Savings account or 529 plan?			Form 1099-Q
Did you receive any disability payments?			Payment statements
		<u> </u>	W-2, 1099 forms
Did you receive payments for serving on a jury?		<u> </u>	1099-MISC, records
Did you sell your principal residence? Includes short sale and foreclosures			1099-S, Closing Disclosure
Did you receive first-time homebuyer credit for this home purchase (2008 or 2009)?			2008 or 2009 returns
Did you sell a home in a prior year for which you received first-time homebuyer credit?			Tax returns showing
Did you have your personal residence foreclosed?			recapture information 1099-C
Did you abandon your personal residence?			1099-A, 1099-C
Did you have any non-business debt that became totally worthless?			Documentation
Did you receive payments from an installment sale?			Payment records
Did you receive interest payments from 2nd trust deeds?		-	Statement(s)
Did you redeem US Savings Bonds? Go to Treasury Direct to get 1099-INT		-	1099-INT
Do you own unredeemed US Savings Bonds?			Face amount,issue date
Did you win money at casinos or from lotteries?			W-2G; casino win-loss
Gross gambling winnings are taxable regardless of receipt of Forms W-2G			stmts; lottery purchases
Did you receive payment for services as a trustee or estate administrator?	1	1	Income total(s)
Did you receive money from renting to a roommate?	1	1	Income total(s)
Did you received credit card awards?	1	1	Annual statement
Did you exchange (barter) for services or goods connected to employment or business?		<u> </u>	Bring documentation

Check Y or N for <u>all questions</u> . For all "yes" answer see the "Documents needed" column to see	Y	Ν	Documents
what information we will need to properly complete your return.	<u> </u>		needed
Retirement Information			
Did you receive money (distributions) from a pension, IRA, 401(k), 403(b), 457 or other plan?			1099-R
Did you receive distributions that were rolled over to another plan account (in full or in part) within 60			1099-R, 5498
days?			Account statements
Did you convert any part of a traditional IRA to a Roth IRA?			1099-R, 5498
Did you rollover any part of a qualified plan (401(k), 403(b), etc.) to a Roth IRA?			1099-R, 5498
Did you contribute money to a traditional or Roth IRA?			5498; statement(s)
Have you taken your Required Minimum Distribution (RMD)?			1099-R
Did you contribute your RMD amount to a charity?			Contribution documents
Did you use retirement plan distributions to purchase a home or pay medical bills?			
Did you receive retirement/social security-type income from a foreign country?			Statements in \$US
Do you or your spouse plan on retiring in the coming tax year?			Details
Did you repay deferred retirement distributions from 2020?			Documentation
Prior Years	1	1	
Did you receive IRS or State Tax Department notice of changes to prior years' returns?	1	1	IRS or State notice(s)
Are you aware of any changes that need to be made to previously filed return(s)?			
Have you received an IRS audit notice?			IRS Audit letter
Have any prior years return(s) been audited and you agreed to changes?			IRS adjustment report
Health and Life Insurance	1	1	into adjustitioni report
Did you have health insurance for you, your spouse, and all dependents? *	1	1	W-2; 1095-A, 1095-B,
* If non-dependent children are on your 1095 form they will need a copy for their return			1095-C, other docs
Deductions	1	1	
Did you pay for medical care, insurance; long-term care insurance, etc.?	1	1	Bring documentation
Did you pay real estate (property) taxes for your home, vacation home, timeshare, vacant land (do not			Dring documentation
include property used in a business or rental activity)?			Bring documentation
Did you pay for vehicle registration?			Registration renewal
Did vehicle registration include personal property tax or "in-lieu" fees?			Payment receipts/slips
Did you purchase a vehicle, boat, airplane?			Purchase documents
Did you pay interest on a loan for your principal residence?		-	1098
Have you refinanced your original purchase mortgage?			Settlement statements
Did you pay Private Mortgage Insurance premiums (PMI)?			1098 or Statements
Did you receive a Mortgage Credit Certificate for your current home loan?			Certificate
Did you pay interest on a loan for a vacation home or other residence not used as a rental or for a commercial business?			1098 or other financing documents
Did you pay interest on a loan from the seller of your principal residence?	-		Loan documents and
 If paid to the seller provide seller's name, address, and Social Security Number 			amortization schedule
Did you pay interest on a loan used to make investments (e.g., stocks/bonds, land, etc.)?			Documentation
			Receipts and
Did you make donations of cash or noncash items to a qualified charity?			documentation of value
Tickets to charitable events require documentation of deductible amounts			No receipt, no
One-time contributions of \$250 or more require a receipt from the charity			deduction
Did you donate a vehicle?			Valuation proof/1098-C
Did you have unreimbursed employment related expenses?			Documentation
Include only amounts that are not reimbursable and that were a requirement to do your job and were			Include employer's
for the convenience of the employer			reimbursement policy
Did you repay amounts previously reported as income (disability, Social Security, unemployment, etc.)?			Documentation
Estimated Tax Payments			
Did you make estimated tax payments to the IRS?			Amounts, dates
Did you make estimated tax payments to your state or another state?			Amounts, dates
I want to have overpayments applied to next year's estimated taxes		1	

Chick Y of N for all <u>dustations</u> , For all yes answer see the <u>Documents needed</u> column to see Y N Didductions Miscellaneous Notice 1444-A Notice 1444-A Did you receive EIP3 (Economic Impact Payment for 2020? Amount \$ Notice 1444-B Did you receive Advance Child Tax Credit payments? Letter 6419 Are you an enrolled tribal member? Enrollment docume Did you receive Advance Child Tax Credit payments? Enter 6475 Are you an enrolled tribal member? Enrollment docume Did you receive at trust during the year? Trust documents Did you rour spouse make gifts of more than \$15,000 to one or more individuals during the year? Trust documents Did you or your spouse participate in a Medical Savings Account (MSA)? Bring documentatio Did you or your spouse participate in a Medical Savings Account (MSA)? Bring documentatio Did you or your spouse participate in a Medical Savings Account (MSA)? Proof of payment(s) Mave you claimed the American Opportunity Tax Credit before? If yes, in which tax year(s)? Proof of payment(s) Have you or a dependent attended college for more than 4 years? Tuition transcript(s) Were you reimbursed for education (tuition or other expenses)? Cryptocurrency (Bitcoin, Ethereum, etc.)? Account statement(s)	
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Did you receive an airdrop?	
Did you receive an airdrop?	
Did you receive any mining income?	-
Which accounting method did you use for prior year transactions? FIFO, LIFO, HYPO	-
Do you buy cryptocurrency using a margin account?	
Did you buy any ICOs (Initial Coin Offering)?	
Have you given any coins away during the year?	
Did you lose crypto currency to a hack or fraud?	
Did you obtain any tax reports from your exchange(s)? Tax reports	
Foreign Accounts (Banks, Investment); Foreign taxes	
Did you receive income from non-US sources? Statement(s)	
Did you pay taxes to a foreign country? Statement(s)	
Did you create or inherit a foreign trust; did you make any transfer to a foreign trust? Documentation	
During the year did you have an interest in or signature or other authority over a bank account or other	
financial account in a foreign country?	
Did you have a bank account in a foreign country? Bank statements	-
Did you have a securities account in a foreign country? Brokerage statemer	ts
Did you have an insurance policy from a company headquartered outside the US? Current year statem	
Did you have a retirement account from a foreign country or company?	
Did you own a mutual fund organized in a foreign country?	
Do you have cryptocurrency with a non-US exchange? All statements	
Did any account have a value on any day during the tax year of \$10,000 or more?	

Page 4 of 5

Check Y or N for <u>all questions</u> . For all "yes" answer see the " Documents needed " column to see what information we will need to properly complete your return.	Y	N	Documents needed
Other Items			
In prior 2 tax returns has credt for CTC, ACTC, or ODC been denied?			Bring notice(s)
Did you pay alimony/spousal support? Date of divorce or most recent modification			Divorce decree
Did you receive an Emergency Financial Aid Grant?			Documentation
			Landlord name, address,
Did you pay rent for your personal residence during the year?			and phone number
			Police report; insurance
Did you have a loss from a casualty or theft?			claim form(s)
Did you make improvements to your home for energy efficiency (solar, fuel cell, etc.)			Purchase documents
Did you make improvements to your home for energy conservation (insulation, doors/windows, etc.)			Purchase documents
If you received tax credits in a prior year, bring all tax return(s) where credit was originally claimed			
Did you purchase a new hybrid or electric vehicle?			Purchase documents
Did you purchase items for use in your state without paying sales tax? Internet or catalog purchases			Use Tax Worksheet
What is the sales tax rate in your community?			Rate:%
Did you purchase fuel for a business vehicle (airplane, car, boat) not licensed for street use?			Gallons/vehicle
Did you pay someone to provide services in your home (housekeeper, caregiver, maintenance, etc.?			Details of payments and
This may require special reporting to the IRS or state tax agency.			work agreements
Do you want to designate \$3 to the Presidential Election Campaign Fund?			Taxpayer
This does not come out of your pocket and does not affect your taxes			Spouse
Electronic Filing & Direct Deposit			<u> </u>
If you are entitled to a refund do you want to have it electronically deposited?		l	Acct info; voided check
If you have a balance due do you want to have your account debited for the amount due?			Acct info; voided check
If using the same account as last year, please verify account number			,
If not using the same account, please bring proof of account (voided check or current acct stmt)			
OTHER INFORMATION FOR PREPARER NOT INCLUDED ABOV	Έ	I	<u> </u>
By my signature(s) below I acknowledge that I have documentation to support a used on my tax return(s). In the event of an audit where such documentation ca			-
defense, I/we hold (firm/preparer) harmless for any adv			• •
may be imposed by the Internal Revenue Service, the Franchise Tax Board or oth			-
may be imposed by the internal Revenue Service, the Franchise rax board of ou	ICI		axing agencies.
Taxpayer Date Spouse			Date
			Balo
It is the legal obligation of taxpayers to report all income received and to claim legitimate and d			
credits. By our signatures above we acknowledge that we have provided information necessar	y t	o f	ulfill our
legal obligations. The following statement appears on your tax forms in the signature space: "			
perjury, I declare that I have examined this return and accompanying schedules and sta	ter	ne	nts, and to the best
of my knowledge and belief, they are true, correct, and complete. "			