

2021

1040

US

Miscellaneous Questions

If any of the following items pertain to you or your spouse for 2021, please check the appropriate box and provide additional information if necessary.

PERSONAL INFORMATION

- | Yes | No | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Did your marital status change during the year? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did your address change during the year? |
| <input type="checkbox"/> | <input type="checkbox"/> | Could you be claimed as a dependent on another person's tax return for 2021? |

DEPENDENTS

- | | | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Were there any changes in dependents? |
| <input type="checkbox"/> | <input type="checkbox"/> | Were any of your unmarried children who might be claimed as dependents 19 years of age or older at the end of 2021? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have any children under age 19 or full-time students under age 24 at the end of 2021, with interest and dividend income in excess of \$1,100, or total investment income in excess of \$2,200? |

HEALTH CARE COVERAGE

- | | | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Did all members of your household have full year health coverage in 2021? If you received IRS document Form 1095-A (Health Insurance Marketplace Statement) and/or CA Form FTB 3895, include them with your tax documents. |
|--------------------------|--------------------------|--|

INCOME

- | | | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive unreported tip income of \$20 or more in any month? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you cash any Series EE U.S. savings bonds issued after 1989 and pay qualified higher education expenses for yourself, your spouse, or your dependents? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive any disability income? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have any foreign income or pay any foreign taxes? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive, sell, send, exchange or otherwise acquire any financial interest in virtual currency? |

PURCHASES, SALES AND DEBT

2021

1040

US

Miscellaneous Questions

Yes

No

Did you start a business or farm, purchase rental or royalty property, or acquire an interest in a partnership, S corporation, trust, or REMIC?

Did you purchase or dispose of any business assets (furniture, equipment, vehicles, real estate, etc.), or convert any personal assets to business use?

Did you buy or sell any stocks, bonds or other investment property in 2021?

Did you sell or do you plan to sell any dividend generating stocks or mutual funds during the first 60 days of 2022?

Did you purchase, sell, or refinance your principal home or second home, or did you take a home equity loan?

Did you purchase a home in 2021 and you were overseas on official extended duty?

Did you make any residential energy-efficient improvements or purchases involving solar, wind, geothermal or fuel cell energy sources?

Did you have any debts cancelled or forgiven?

Does anyone owe you money which has become uncollectible?

RETIREMENT PLANS

Did you receive a distribution from a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.)?

Did you make a contribution to a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.)?

Did you transfer or rollover any amount from one retirement plan to another retirement plan?

Did you convert part or all of your traditional, SEP, or SIMPLE IRA to a Roth IRA in 2021?

EDUCATION

Did you receive a distribution from an Education Savings Account or a Qualified Tuition Program?

Did you, your spouse, or a dependent incur any tuition expenses that are required to attend a college, university, or vocational school?

2021

1040

US

Miscellaneous Questions**ITEMIZED DEDUCTIONS**

Yes

No

- Did you incur a loss because of damaged or stolen property?
- Did you work out of town for part of the year?
- Did you use your car on the job (other than to and from work)?

ESTIMATED TAXES

- Did you apply an overpayment of 2020 taxes to your 2021 estimated tax (instead of being refunded)?
- If you have an overpayment of 2021 taxes, do you want the excess applied to your 2022 estimated tax (instead of being refunded)?
- Do you expect your 2022 taxable income and withholdings to be different from 2021?

FOREIGN INCOME AND ASSETS

- Did you have an interest in or signature or other authority over a financial account in a foreign country, such as a bank account, securities account, or other financial account?
- If yes to 1, did any of your foreign financial assets consist of cash and/or securities and if so, was the accumulated value of these accounts over \$10,000 at any time during 2021?
- If yes to 1, was the accumulated value of all your foreign financial assets over \$50,000 on the last day of 2021?
- If yes to 1, was the accumulated value of all your foreign financial assets at least \$75,000 at any time during 2021?
- Did you receive a distribution from, or were you the grantor of, or transferor to, a foreign trust or did you have an interest in any foreign assets or accounts?

MISCELLANEOUS

- Do you want to electronically file your tax return?
- Do you want to allocate \$3 to the Presidential Election Campaign Fund?

2021

1040

US

Miscellaneous Questions

Yes No

Does your spouse want to allocate \$3 to the Presidential Election Campaign Fund?

May the IRS discuss your tax return with your preparer?

Was your home rented out or used for business?

Did you have a Health Savings Account (HSA)?

Were you a policyholder who received payments under a long-term care (LTC) insurance contract or received any accelerated death benefits from a life insurance policy?

Are you a member of the Armed Forces of the United States on active duty who moved pursuant to a military order related to a permanent change of station?

Did you engage the services of a household employee, such as a nanny or home health care worker?

Did you incur moving expenses due to a change of employment?

Were you notified or audited by either the Internal Revenue Service or the State taxing agency?

Did you or your spouse make any gifts to an individual that total more than \$15,000, or any gifts to a trust?

For the purpose of having your tax refund directly deposited, did your bank account information change within the last twelve months?

COVID-19 RELATED TAX LEGISLATION

Did you receive the 3rd economic impact payment in 2021? If so, how much per household? If you received Form 1444-C, include it with your tax documents.

Did your business have any PPP loan amounts forgiven? If so, provide documentation of date loan was granted.

Did you receive an advance child tax credit? If so, how much? If you received Letter 6419, include it with your tax documents.

Signature(s)

Taxpayer _____ Date _____

Spouse _____ Date _____