

MISCELLANEOUS QUESTIONS

If any of the following items pertain to you or your spouse for 2023, please check the appropriate box.

YES NO

PERSONAL INFORMATION / DEPENDENTS

- Did your marital status change during the year?
Did your address change during the year? Please provide new address.
Were there any changes in dependents?
Did you have any children under age 19 (24 for full time students) who had unearned investment income of \$2,500 or unearned income of \$350 and total gross (earned and unearned) income of \$2,500?

INCOME

- Did you receive any pension income or make any IRA withdrawals?
Did you receive any social security income?
Did you receive any disability income?
Did you have any out of state income?
Did you have any rental income (Airbnb, VRBO, or long term)?
Did you have any unemployment compensation income?
Did you have any foreign income or pay any foreign taxes?
Did you trade or sell Bitcoin or other virtual crypto currency?
Did you receive Bitcoin or virtual currency as a reward, winnings, Ford, services or staking?
Did you hold any digital assets in a foreign wallet?
Did you receive any monies from crowd funding such as GoFundMe etc.?
Did you receive any alimony? Please provide date of dicorce.

PURCHASES, SALES, AND DEBT

- Did you start a business or farm, purchase rental or royalty property, form or acquire an interest in a Partnership, Corporation, S Corporation or Trust?
Did you purchase, sell, or refinance your principal home or second home, or did you take a home equity loan?
Did you sell or exchange any stock, cryptocurrency, real property, or business assets during the year?
Did you have any debts cancelled or forgiven or declare bankruptcy?
Did you exercise any stock options?
Did you make any payments on an EIDL loan?
Do you plan to start a new business or buy real property in 2024?
Did you have a short sale, foreclosure, or repossession of any property?
Did you have any forgiveness of PPP loan?

ITEMIZED DEDUCTIONS

- Did you incur a loss due to a fire, earthquake, flood, theft/fraud, or accident? Were you in a Federally declared disaster area?
Did you work out of town for any part of the year?
Did you use your car on the job (other than to and from work)?

MISCELLANEOUS

- Did you have health insurance coverage all yr? – provide all forms 1095-A/B/C
Did you receive a health insurance subsidy paid to you or directly to insurance?
Was your home rented out or used for business?
Did you file all required 1099’s for business and rental expenses over \$600?
Did you purchase a new 100% Electric Vehicle (plug-in)?
Did you install solar equipment on your home?
Did you install a charging station for your electric vehicle?
Did you incur moving expenses due to a change of employment? (CA only)
Did you incur any adoption expenses (foreign or domestic)?
Did you have distributions from a 529 college savings plan?
Did you conduct or have a business location within the city of Los Angeles? (Did you have any 1099 Income, and did you file a business renewal?)
Were you notified or audited by either the Internal Revenue Service or the state tax agency? Please provide correspondence.
Did you or your spouse make any gifts to an individual that total more than \$17,000, or any gifts to a trust?
Is your beneficiary designation for your pension or IRA current?
Do you have a will or trust in place?
Do you have signature authority on a financial account or other assets in a foreign country that had a value over \$10,000 at any time during the year?
Did you receive a gift, inheritance, or foreign trust from a foreign person?