

MISCELLANEOUS QUESTIONS

If any of the following items pertain to you or your spouse for 2025, 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 \$2,700 or unearned income of \$1350 and total gross (earned and unearned) income of \$2,700?
		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 divorce.
		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 2026?
___	___	Did you have a short sale, foreclosure, or repossession of any property?
		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)? Before 9/30/25
___	___	Did you install solar equipment on your home?
___	___	Did you install a charging station for your electric vehicle? Before 9/30/25
___	___	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 \$19,000, 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?