

Please indicate the appropriate box and include all necessary details and documentation. You can skip areas that do not apply to you. Just let us know by marking them out.

Personal Information

Did your marital status change during the year? Yes/No
If yes, explain:

Did your address change from last year? Yes/No

If you are under 24 and/or made less than \$4,300, who else might be able to claim you?

Did you change any bank accounts or did routing transit numbers (RTN) and/or bank account number change for existing bank accounts that have been used to direct deposit (or direct debit) funds from (or to) the IRS or other taxing authority during the tax year? Yes/No

Please verify your direct deposit information with us, as this is also how stimulus payments have been made. If you do not get a deposit from the IRS, you can go to the IRS to put in your bank account information for stimulus purposes.

Do you, your spouse (if applicable), and any dependents have a taxpayer identification number (SSN, ITIN, or ATIN)? Yes/No

Does any person listed on your return have an IP PIN issued by the IRS? If yes, attach the IRS letter. Yes/No *Starting this year, everyone can apply for one.*

Did you reside in or operate a business in a Federally declared disaster area? *The Federally declared disaster areas include victims of hurricanes, tropical storms, floods as well as wildfires.* Yes/No

Health and Medical

Please provide documentation about health insurance coverage for all members of your household/names on your return.

Did you buy any insurance from Covered California or another government sponsored exchange? Yes/No

If yes, it is critical we receive all 1095-A Forms for your household.

Do you or your spouse have long term care insurance?
If so, please provide the cost for EACH policy. Yes/No

If yes, did you receive any benefits related to this policy this year? Yes/No

Are you covered by a Cafeteria plan/Section 125 plan/FSA/medical reimbursement plan? Yes/No

If you paid for medical insurance through work, was it paid with pre-tax dollars? (Unsure? Provide your year end paystub) Yes/No

If you are a retiree, do you pay for medical insurance supplements in addition to medicare?: Yes/No

If yes, please provide a list of all insurances and amounts paid for the year. If paid through your pension, please provide a check stub.

Is your insurance a high deductible plan eligible for a Health Savings Account (A code W on your W2 indicates a YES)? Yes/No

If yes, did you make any contributions not through work? Yes/No

If you have a Health Savings account, did you take any withdrawals? Yes/No
If yes, please provide 1099-SA.

If you answered yes, did you use all withdrawals for qualified medical expenses? Yes/No

If you paid for nursing care, rehabilitation, medical, dental, vision, chiropractic, therapy, prescriptions, ambulances and/or any other medical expenses that total more than 7.5% of your income, please provide a detailed list of expenses separately.

For mileage driven related to medical care, please provide the total number of medical miles for the year.

Please note any additional health insurance related questions/comments.

COVID-19 Information

Did you receive an Economic Impact Payment (EIP or EIP 2) as reported on Notice 1444 or 1444-B? Yes/No

If we do not match this exactly with what the IRS says you got, your return may reject for electronic filing. You can call the IRS or go online (they said) to find this information. We can also retrieve it if we have an Authorization from you to communicate with the IRS on your behalf. This is a limited Power of Attorney Form 2848. One would be required for taxpayer and spouse.

Did you receive emergency leave sick pay? Yes/No
Did you receive emergency family leave wages? Yes/No

If you were any employee who worked from home this year, please answer the following:

If you worked from home this year, as an employee, did your employer reimburse you for any expenses? Yes/No

FYI: Federal law does not allow for employee expenses related to work from home.
For state purposes, if you worked from home, did you have any area used regularly and exclusively only for work? Yes/No

If yes, please complete our business use of home worksheets.

Dependent Information

If you are claiming dependents, make sure to complete dependent questions.

For any dependents claimed, we need to verify age, relationship, where they lived, and any income/support attributed to them (such as wages, interest, dividends, inheritances, student loans, hobbies, scholarships, investments, etc.)

If we already have age and relationship information, we do not need these again.
Proof they lived with you and income is an annual requirement.

Were there any changes in dependents from the prior year? Yes/No

If yes, explain, and provide age and relationship support for additions.

Do you have any children under age 19 or a full-time student under age 24 with unearned income in excess of \$2,200? Yes/No

Do you have dependents that will be filing tax returns? Yes/No

If yes, please make sure they either wait until your return is done, or provide us with the information to file so it does not interfere with the filing of your tax return.

If you have any dependents over the age of 18, and under 24 were they a full-time student for at least 5 months at any time during 2020? Yes/No

Did you provide over half the support for any other person(s) other than your dependent children during the year? Yes/No

If yes, please describe the relationship(s) and how long the person(s) lived in your home.

Did you pay for child care while you worked, looked for work or while a full-time student? Yes/No

If yes, we need the amounts paid per child, as well as the name, address, tax id, phone and dollars paid per provider. We need this even if it was paid through a payroll deduction at work.

Did you adopt a child this year or pay any expenses related to adoption ?
Yes/No

If you are divorced or separated from another parent of your child(ren), the custodial parent is the parent with whom the child(ren) spend the most nights during the year.

If you are divorced or separated with child(ren), are you the custodial parent of one or more children? Yes/No

If you are not the custodial parent, and you wish to claim one or more children, do you have a signed Form 8332 releasing the child(ren) to you? Yes/No *This is required by the IRS to claim the child(ren). Court orders are not enough under current law. If the other party claims the child and you do not have a signed release, the IRS will give the exemption to the other person and suggest you take it up in family court. If you do not claim the children when you are expected to do so, it can actually trigger a change in child support as that calculation uses tax credits/incentives as part of the equation.*

Are there any other persons who may try to claim any of your dependents?
Yes/No

If yes, please explain who else might claim, and why you are the person entitled to claim the dependent under federal tax law.

Are you and your spouse the only parents of the child(ren)? Yes/No

If both parents of the child(ren) are not filing together, did the child live in this household more than in the other parent's household? Yes/No

If both parents do not file together, are you the parent with the higher income?
Yes/No

If neither you nor your spouse are a parent of the child(ren), is your income higher than any parent of the child? Yes/No

If neither you nor your spouse is a parent of the child(ren), please explain why no parent is claiming.

Is your child totally and permanently disabled? Yes/No
If yes, please describe the nature of the disability. Additional information may be required. A current year SSI statement will suffice as the federal government has already determined disability.

Have you had any credits, such as Earned Income Tax Credit, Child Tax Credit, Other Dependent Credit, American Opportunity Credit, disallowed in the past?
Yes/No

If yes, please explain:

If additional information is required to prove your right to claim any dependents or credits on your return, can you provide this information? Yes/No

Are all dependents residents of US? Yes/No

Did you accurately report all of your income and expenses on your tax return, especially if you are self-employed? Yes/No

Please use the is space to explain to us or ask any questions regarding any of your dependents.

Home Information

For how many months, if any, did you rent a home in California? _____ (CA renter's credit question - if a renter you may qualify for a credit of \$60 or \$120 depending on filing status and income)

Do you own your home? Yes/No

If yes, approximately when did you buy your home and how much did you pay for it? _____

Do you have a mortgage or mortgages on your home at any time in 2020?
Yes/No

If yes, please provide the ending balance of your mortgage(s) on 12/31/20 as well as all 1098 Mortgage interest statements.

If your mortgage was changed in any way, please make sure you provide ALL mortgage interest statements to cover the full year of interest paid.
Do you have an impound or escrow account on your mortgage that is used to pay your property taxes and insurance? Yes/No

If yes, are the property taxes reported on your mortgage interest statement?
Yes/No

If not, or if you pay directly, please provide information about any property taxes you paid and the dates of payments.

Did you buy, sell, take a home equity loan or refinance your home (or any other real estate) this year? Yes/No

If yes, please provide final settlement statements for these transactions.

If your total debt on your house increased this year, please explain the use of the funds:

Have you ever taken any equity out of your home? Yes/No

If yes, only funds used to buy, build or improve your home generate tax deductible interest.

Can you prove that the only debt secured by your home was to buy, build or improve your home? Yes/No

If you have used money from your home for anything other than to buy, build or improve your home, we will need additional information to determine your deductible mortgage interest if we have not already received this information in a prior year.

Did you foreclose or abandon a principal residence or real property during the year? Yes/No

Is there anything else we should discuss about your home or a mortgage on your home? Yes/No
Please Describe:

Do you own any other real estate that is not a rental or business asset?
Yes/No

If yes, please provide all information required for your home for this real estate as well.

Investments and Passive Income

Did you start a new business or purchase rental property during the year?
Yes/No

Did you acquire a new or additional interest in a partnership or S corporation?
Yes/No

If yes, we have additional information we need for rentals and businesses. Please complete the related questions for these further down.

Do you have any interest income: banks, savings, savings bonds, impound mortgage accounts, seller carried notes, etc. Yes/No

Do you have any dividend income? Yes/No

Do you have income from any annuities? Yes/No

Did you acquire or dispose of any stock, bonds, mutual funds or other investments outside or retirement accounts during the year? Yes/No

If so, please provide the FULL package related to these transactions. These are often not final until late March.

Do you receive any royalties? Yes/No

Were you the beneficiary of any trusts or inheritances? Yes/No

Often a K-1 will be sent related to a trust or estate. Please verify if you will receive on, and provide. Sometimes these will not be available for many months.

Did you receive any income from property sold prior to this year? Yes/No

Earned Income Not from Self-employment

Do you have any W2's? Yes/No If yes, how many? _____

Did you receive tip income not reported to your employer this year? Yes/No
If yes, how much?

Did you receive any income from a job not on a W2? Yes/No

If yes, do you consider yourself an employee or a business? Or ???

Do you have 1099-Misc? Yes/No If yes, how many? _____

Do you have any 1099-NEC? Yes/No If yes, how many? _____

Did you receive income for work you performed for which you have not received any documents from the payer? Yes/No If yes, please explain:

Did you receive income to provide care for another person living in your home?
Yes/No

If yes, this may not be taxable. Please discuss with your preparer, especially if new this year.

Did you have any foreign income or pay any foreign taxes during the year, directly or indirectly, such as from investment accounts, partnerships or a foreign employer? Yes/No

Did you buy or sell items online not related to personal use? (The IRS will ask this if your are audited.) Yes/No

Did you barter or trade for any items or services, or participate in a barter club?
Yes/No (Another IRS audit question).

"Unearned" Income - deserved, but does not qualify for "earned income" related credits

Did you receive a tax refund from a state this year? Yes/No

Did you receive any unemployment benefits during the year? Yes/No

If yes, there may or may not be a Congressional act to exclude this from income. If you did not, are you sure you are not a victim of the California EDD fraud problems?

Did you have any paid family leave? Yes/No

Did you receive any awards, prizes, SPIFFS, hobby income, gambling or lottery winnings? Yes/No

Did you receive (or pay) any alimony? Yes/No

If yes, please provide the date of the most recent court order (estimates are okay if before 2018)_____

If this was modified after 2018, what did the court order say (if anything) about the new law?

Did you have any debts canceled, modified or forgiven this year, such as a home mortgage or student loan(s)? Yes/No

If yes, have you declared bankruptcy? Yes/No

If you had debt relief not related to bankruptcy, it is likely taxable. Please be prepared to discuss whether or not you are insolvent. To get a head start on this, you can request an insolvency worksheet.

Did any of your life insurance policies mature, or did you surrender any policies? Yes/No

Did you have any sales or other exchanges of virtual currencies (including from an airdrop or a hard fork), or used virtual currencies to pay for goods or services? Yes/No (The IRS can track this despite rumors to the contrary)

Did you have any election official pay? Yes/No

Did you receive any jury pay? Yes/No

Did you receive any payments from class action or other legal settlements? Yes/No

If yes, please explain:

Often, for labor class action settlements, there is usually one paper with three kinds of forms, please circle the form type on each square so we are all aware of the different tax treatments and the total amount.

Retirement Income/Withdrawals

Did you receive any Social Security benefits during the year? Yes/No

Did you make any withdrawals from an IRA, Roth, myRA, Keogh, SIMPLE, SEP, 401(k) or other qualified retirement plan? Yes/No

If yes, were any withdrawals due to a Federally declared disaster or COVID-19?
Yes/No

If you received any qualified disaster retirement plan distributions, did you repay any of the distributions in 2020? Yes/No

If you are over 70, did you use your IRA to make any charitable donations (a QCD)? Yes/No
This can be a great tax savings strategy for those who do not itemize, or who barely itemize, but wish to support their favorite charities.

Did you receive any lump-sum payments from a pension, profit sharing or 401(k) plan? Yes/No

Was this your first year receiving any pension or retirement benefits? Yes/No

Did you inherit any IRA's or other retirement plans? Yes/No

If yes, it is important to be aware the IRS has changed the rules regarding distributions. You may have to liquidate the entire IRA within the next 10 years. Please discuss with your preparer if this applies to you.

Likely Tax Free Income

If you are audited for this year, the IRS will ask about non-taxable money deposited into your accounts. We ask to document this now, just in case, so you don't have to try to remember later. Sometimes, these answers can help create better deductions too!

Did you have any disability: VA, California SDI, Private disability, Work comp, Other? Yes/No
If yes, how much?

Did you receive any payments for foster or adopted children? Yes/No
If yes, how much?

Did you receive any child support? Yes/No
If yes, how much?

Did you receive any welfare/Snap/or other government assistance? Yes/No
If yes, how much?

Did you borrow any money this year? It's not current income, but can help answer some other questions Yes/No

Did you receive any large gifts this year? Yes/No

Please describe any other non-taxable income or support you may have had, or unusual tax free deposits into your accounts:

Energy Credits

Did you purchase a qualified plug-in electric drive vehicle or qualified fuel cell vehicle this year? Yes/No

Did you install any solar, geothermal, or other qualified energy property? Yes/No

Have you already received the \$500 per LIFETIME energy efficient home improvements credit? Yes/No

If not, have you installed any energy efficient property to your home this year? (Windows, doors, heaters, air conditioners, insulation, etc.) Yes/No

If yes, please provide the details. And, no, appliances do not count. :(

Retirement Savings

Are you an active participant in a pension or retirement plan? Yes/No
Is your spouse (if applicable)? Yes/No

Did you make any contributions to an IRA, Roth, myRA, Keogh, SIMPLE, SEP, 401(k) or other qualified retirement plan? Yes/No

Would you like to consider making any retirement contributions for 2020 before April 15? Yes/No

If you are interested, outside of tax season we can schedule an appointment with you to review your retirement plans and feasibility. This is a billable service, however we are finding many clients unaware of what it takes to retire and whether or not they are ready.

Charity Section Heading

Did you make any contributions of money (cash, check or charge) this year? Yes/No

Even if you do not itemize, new this year is an "above the line" deduction for this of up to \$300. For 2021, it is \$300 or \$600 if married filing jointly.

If you made any contributions of \$250 or more at any one time, do you have a written acknowledgement from the receiving organization? Yes/No

If yes, please provide this documentation, if you answered no, the deduction is not valid without such an acknowledgement.

There have been several tax court cases where the donor can prove the donation, but the did not have a "contemporaneously written acknowledgement" (letter dated on or before the date the tax return was file). We scan these for you. If you are audited, we will have a copy if you cannot find yours.

Did you make any donations of "stuff" to charity in good or better used condition?
Yes/No

If yes, was the total value greater than \$500? Yes/No

If yes, we need details of dates, organizations, items, fair market values, and approximate purchase values. Yes/No

If the value was over \$5,000 for any one item or class of items (clothes vs. furniture vs. toys, etc.) do you have an appraisal? Yes/No

Donations valued at more than \$5,000 require an appraisal to take the deduction in most cases.

Did you donate stocks, bonds, mutual funds or other publicly traded instruments?
Yes/No

Did you incur any out-of-pocket expenses related to volunteer work for a charity?
Yes/No
(No, your time does not count).

Did you drive related to any charitable work or donation? If yes, we need the mileage. Yes/No

Did you donate a car, truck, boat or other vehicle to charity? If so, we need the 1098C Yes/No

Tax Payments

Did you pay any taxes on personal property (such as the VLF on a car or a boat tax?) Yes/No

If you cannot find the car registration information with the VLF for a car, you can provide us with the last 5 digits of the VIN and the license plate information. We can look it up.

Did you pay any prior year state taxes? Yes/No

Did you pay sales tax on any large purchases, like a vehicle, boat, aircraft, or materials for a home remodel? Yes/No

Did you make any state estimated tax payments? Yes/No

Did you make any federal estimated tax payments? Yes/No

Deductions only allowed for California and some other states

Did you pay any union dues? Yes/No

Did you pay any "supplemental" "working" or other dues to a union tied to the hours worked? Yes/No

Did you pay for any work uniforms (clothing required by work, only worn at work, only suitable to wear for work when new?) Yes/No

If yes, please provide cleaning, maintenance, altering, and laundering information.

Did you pay for any work related safety equipment or personal protective equipment? Yes/No

Did you travel away from home overnight for work for which your employer did not reimburse you in full? Yes/No

Did you take any work related continuing education? Yes/No

Pay for local meals with a client, customer, or prospect for which you can document the details of who, where, what, why and when AND you were not reimbursed? Yes/No

Do you have unreimbursed work related mileage which is NOT commute? Yes/No

Does your employer pay you any per-diems, allowances, or other expense payments that are not direct reimbursements? Yes/No

If yes, please provide a paycheck stub for the end-of-the-year any support for expenses you paid.

Did you have any job search investments for the same line of work? Yes/No

Did you move into a new state for work? Yes/No

Did you pay for any other unreimbursed expenses related to work? Yes/No

Question

If so, please describe:

Did you pay for any tax advice, representation, preparation or other services or fees related to getting, reporting, planning or keeping taxable income? Yes/No

Did you pay any investment related expenses? Yes/No

Any other miscellaneous questions?

Educators/Teachers

Do you work in education in a K-12 environment such as a teacher, aid, counselor, paraeducator or other position? Yes/No

If yes, please clearly indicate which of the work expenses are related to work in education. Personal Protection and other COVID-19 related expenses are included.

Up to \$250 (\$500 if both spouses are qualified educators) are allowed as an adjustment to income.

If you have more, do any of the expenses qualify as a charitable donation to the school? Yes/No

Did you pay for any other unreimbursed expenses related to work? Yes/No
If so, please describe:

College/Vocational Education Information

Did you, your spouse, or your dependents attend a post-secondary school during the year, or plan to attend one in the coming year? Yes/No

Did you have any educational or vocational expenses during the year on behalf of yourself, your spouse, or a dependent? If yes, attach any Form(s) 1098-T and receipts for qualified tuition and related expenses. Yes/No

The 1098-T is seldom mailed home. It is usually posted in the student's online account. Lots of useful information we need to correctly support and calculate education related benefits can be found in the financial activity areas online.

Did anyone in your family receive a scholarship, grant, or other financial aid of any kind during the year? Yes/No Question

If yes, please provide details about the financial aid award (grant types and amounts, scholarship names and amounts, etc.)

Where did the student live while in school?

If the student lived out of the home, please provide costs for room, board and related expenses.

Did you make any withdrawals from an education savings or 529 Plan account?
Yes/No

If yes, were any of these withdrawals rolled over into an ABLE (Achieving a Better Life Experience) account? Yes/No

Did you make any contributions to an education savings or 529 Plan account? Yes/No

Did you cash any Series EE or I U.S. Savings bonds issued after 1989? Yes/No

Would you like a worksheet to aid in the completion of a Free Application for Federal Student Aid (FAFSA) with the U.S. Department of Education? Yes/No

Has the student completed a Bachelor's degree program? Yes/No

If no, has the American Opportunity or HOPE Credit been claimed for this student in the past? Yes/No

If yes, how many times has one of these credits been claimed? Yes/No

Please provide receipts for any course related materials, books, or other expenses.

Other Questions

Did you make any contributions to an ABLE (Achieving a Better Life Experience - a kind of special account to save for future needs of disabled persons) account? Yes/No

If yes, attach any Form(s) 5498-QA you received. Yes/No

Did you receive any withdrawals from an ABLE (Achieving a Better Life Experience) account? If yes, attach any Form(s) 1099-QA you received. Yes/No

Did you pay any student loan interest this year? Yes/No

Did you incur interest expenses associated with any investment accounts you held? Yes/No

Did you make any out-of-state purchases (by telephone, internet, mail, or in person) for which the seller did not collect state sales or use tax? Yes/No
If yes, what is the dollar value of the purchases? _____

Did you make gifts of more than \$15,000 to any individual? Yes/No

Did you incur moving costs because of a permanent change of station as a member of the Armed Forces on active duty? Yes/No

Did you pay any individual as a household employee during the year? Yes/No

Did you receive a distribution from, or were you a grantor or transferor for a foreign trust? Yes/No

Did you have a financial interest in or signature authority over a financial account such as a bank account, securities account, or brokerage account located in a foreign country? Yes/No

Do you have any foreign financial accounts, foreign financial assets, or hold interest in a foreign entity? Yes/No

Did you receive correspondence from the State or the IRS other than anything related to something listed above? Yes/No

If yes, explain:

Do you have any previous years of tax returns that are either unfiled or filed with unpaid balances due? Yes/No

Do you expect a large fluctuation in income, deductions, or withholding next year? Yes/No

Do you want to designate \$3 to the Presidential Election Campaign Fund? *If you check yes, it will not change your tax or reduce your refund.*
Taxpayer Yes/No Spouse Yes/No

Support for Local Organizations (we are involved each, and know they use 100% of donations for services and programs)

Would you like to participate in our local charitable giving project? We will match dollar-for-dollar up to \$2,000 per charity. Yes/No

If yes, please indicate how much you would like to contribute to each charity below - remember, every dollar counts! And you can get a tax write off for 2021 even if you do not itemize!

Haven of Peace (a shelter for women and children who are victims of domestic violence) _____

Hope 4 Horses (rescue and rehabilitation for horses) _____

Puentes (community development and education addressing food insecurity)_____

Stockton Impact Corps (small and micro business support, education resources, office spaces, and soon a commercial kitchen!) _____

YFC Point Break Adolescent Resources (support, education and counseling for youth in crisis)_____

THANK YOU FOR SUPPORTING OUR COMMUNITY!

Rental Property Section Heading

Do you have one or more rental properties (including vacation rentals)?
Yes/No

Do you rent your property for Fair Market Value? Yes/No

Please provide income and detailed expenses for each rental property. Worksheets are available if not in your organizer.

Did you purchase, sell, refinance, exchange or take equity from any rental property? Yes/No

Do you, friends or family use the property for more than 14 days per year?
Yes/No

If yes, please detail the number of days used for this purpose_____

Please indicate the number of days the property was rented for fair market value if there was any non-paid use. _____

Did you receive an EIDL related to your rental property? Yes/No

The "uncomfortable questions:"

*This set of questions is asked on the physical tax return. If you did, and you say no because you do not want to issue a 1099, remember you are signing your return under penalties of perjury. It is better say yes, and then admit you are not issuing the 1099's as required, though in that case, California will not allow the deduction.)
And, if you were supposed to and do not, you will not be eligible for the potential 20% of profit Qualified Business Income Deduction (QBIID))*

Did you pay any persons or businesses that are NOT incorporated more than \$600 during the year? (This includes gardeners, repair persons, maintenance services, contractors, etc.) Yes/No

If Yes, did you issues Forms 1099-NEC? Yes/No

If no, will you? Yes/No

Sole Proprietorship Business or Farm (Schedule C or Schedule F) Section
Heading

Is your business deemed "essential?" Yes/No

Did you receive a Paycheck Protection Program (PPP) loan? Yes/No

If yes, did you apply for Paycheck Protection Program (PPP) loan forgiveness?
Yes/No

If you are self-employed, were you unable to perform your self-employed activities due to coronavirus related care you needed? Yes/No

If yes, for how many days?_____

If you are self-employed, were you unable to perform your self-employed activities due to coronavirus related care you provided to another? Yes/No
If yes, for how many days? _____

If you are self-employed, were you unable to perform your self-employed activities due to coronavirus related care you provided to your son or daughter under the age of 18? Yes/No
If yes, for how many days? _____

Did you sell, exchange, or purchase any assets used in your trade or business?
Yes/No

If yes, please provide purchase/sale/exchange documentation.

Do you use vehicles for business purposes? Yes/No

If yes, do you keep a log of your mileage? Yes/No

We like MileIQ for this - it is an app that runs on your smart phone.

If yes, do you have another vehicle for personal use? Yes/No

If you provide vehicles to others, how do you account for personal use?

Do you have employees? Yes/No

If yes, are you aware of the Employee Retention Credit (ERC)? Yes/No

If yes, are you eligible? (shut down at least partially, or decline of gross receipts more than 50% in any quarter?) Yes/No

If you are eligible, did you claim the ERC on your 4th quarter 941? Yes/No

If you are uncertain about any of these ERC questions, please be prepared to discuss this. The credit is up to \$5,000 per employee for 2020. For 2021, it is easier to get and the amount is greater.

If you are a business owner, did you pay health insurance premiums for your employees this year? Yes/No

If you worked from home, did you have any area used regularly and exclusively only for work? Yes/No

If yes, please complete our business use of home worksheets.

The "uncomfortable questions:"

This set of questions is asked on the physical tax return. If you did, and you say no because you do not want to issue a 1099, remember you are signing your return under penalties of perjury. It is better say yes, and then admit you are not issuing the 1099's as required, though in that case, California will not allow the deduction.)
And, if you were supposed to and do not, you will not be eligible for the potential 20% of profit Qualified Business Income Deduction (QBID))

Did you pay any persons or businesses that are NOT incorporated more than \$600 during the year? *(Beware of paying people as independent contractors who should really be employees)* Yes/No

If Yes, did you issue Forms 1099-NEC or 1099-MISC? Yes/No

If no, will you? Yes/No

Please provide detailed information about the income and expenses for you business if we do not do your bookkeeping.
If you use Quickbooks, we would like access to your books - either online or as an Accountant's copy - so we can make journal entries as we go and/or verify answers to many of our questions.

Please be prepared to answer additional questions about your business.

Thank you for taking the time to complete to answer the questions relevant!