

LA Tax Service, LLP

Questionnaire 2022

Questions reflect either **You** and/or **Spouse**

Yes No

- Marital status changes this year?
- Changes to your dependents? (If so, bring social security # of new Dependents)
- Have any **children** under age 19 or full-time students under 24 at the end of 2022, **with interest and dividend income** in excess of \$1000, or total investment income in excess of \$2000?
- Did you and your dependents have health care coverage for the full year?
Must bring 1095-A form to interview.
- Did you make any estimated payments to IRS & FTB including extension?**

Estimated Payments	Dated Paid	Federal Amount	State Amount
4/2022			
6/2022			
9/2022			
1/2023			

- At any time during the tax year, did you received, sell, send, or exchange or otherwise acquired any financial interest in any virtual currency.
(Crypto Currency)
- Childcare expenses? Need name of provider address, Federal ID # and amount paid by provider by child.
- Tip income** of \$20 or more in any month?
- Social Security, Disability, or unemployment income?** Bring 1099
- Receive any **settlements**: due to injury or property?
- Sell **stocks, bonds, or other investment property?** (If so, please bring any information) Bring 1099

Yes No

- Purchase, sell or refinance** your principal **home** or second home, or did you take a home equity loan? (If so, please bring settlement closing documents.)
- Purchase a new alternative motor vehicle** (hybrid, electric, fuel cell, plug in)? Bring car purchase details. Long sheet provided at purchase.

- Receive a **distribution** from or make a **contribution** to a **retirement plan** (401K, IRA, etc. Bring 1099R.

- Transfer or rollover** any amounts from one retirement plan to another **retirement** plan? Bring 1099.
- Convert** part or all your traditional, SEP or Simple IRA to Roth IRA? Bring 1099R.
- Health Savings Account (HSA)**? Provide amount contributed & amount spent by HSA.
- Tuition** expenses? (Business accounts, or vocational school)1098T provided by college.

- Receive a distribution form an **education savings account** or a qualified tuition program? Bring 1099Q.

- Loss because of **damaged or stolen** property? Are you in a federally declared disaster area?
- Use your **car on the job** (other than to and from work)? If so, please bring mileage log.
- Purchase a new motor vehicle**? If so, bring long sheet provided by dealer.
- Home rented out or used for business? (Home office)
- May the IRS discuss your, and/or your spouses, tax return(s) with your tax preparer?
- Audited** by either the IRS or the State taxing agency?
- Do you have a **foreign bank account that has/d \$10,000 or more USD? at any time during the year?** If so, provided the bank name, address, account number and balance. Filing deadline of report is June 30th.

Yes No

- Did you receive a distribution from, or were you the grantor of, or transfer to, a **foreign trust** or did you have an interest in any **foreign assets or accounts**?
- Did you, or your spouse, receive any **foreign sourced funds** from foreign pension, companies, trust, or individuals? Or pay foreign taxes?
- Lost a home in bankruptcy, short sale, or foreclosure?
- Any debt cancelled or forgiven?
- Does **anyone owe you money** which has become uncollectible?
- Work as **self-employed** businessperson? If so, did you file for city business tax? have you sent in your 1099's? Required if you paid anyone \$600 or more in 2022.

- Have you **Amended 941 returns for 2020 or 2021** for employee retention credits?
- Have you received **employee retention credit refunds**?
- Start a business** or farm, purchase rental or royalty property, or acquire an interest in a partnership, S corporation, trust, or REMIC? Please bring k-1.
- Purchase or dispose of any business assets** (furniture, equipment, vehicles, real estate, etc).or convert any personal assets to business use? If so, bring dates & amounts.
- Did you **work out of town** for part of the year?
- Give any **gifts in excess of \$16,000**?
- Did you, or your spouse, **purchase** any items **from an out-of-state retailer** (or a **foreign retailer**) and **not pay California use tax?** (i.e. amazon.com, books clothes, furniture, etc.)