

Questions — All Taxpayers

(Provide related statements or other documentation.)

"You" refers to both taxpayer and spouse — enter "?" if unsure about a question.

LIFESTYLE & TAXES	Yes	No	Are either you or your spouse legally blind?		
	Yes	No	Did you pay or receive alimony in 2020?	Recipient's SSN	Date of divorce or separation
			Paid	Received \$	
	Yes	No	Did you have medical insurance all year?		
	Yes	No	Did you purchase health insurance through Covered California or other public exchange? If yes, provide form 1095-A		
	Yes	No	Will there be any significant changes in income or deductions next year, such as retirement?		
	Yes	No	Are you involved in bankruptcy, foreclosure, repossession, or had any debt (including credit cards) cancelled?		
	Yes	No	Did you make any untaxed out of state purchases in 2020?		
	Yes	No	Were you a citizen of or lived in a foreign country in 2020?	Foreign country	
	Yes	No	Do you own or have financial interest in a foreign bank or financial account? Balance exceeds \$50,000		
			Yes	No	
	Yes	No	Did you receive Stimulus payment #1? If so, provide the amounts.		
Yes	No	Did you receive Stimulus Payment #2? If so, provide the amounts.			
Yes	No	Did you receive any unemployment compensation in 2020? If yes, provide form 1099-G			
CHILDREN & EDUCATION	Yes	No	Were any children born or adopted in 2020? (Provide statement for other expenses.)		
	Yes	No	Were any children attending college?	Year in college	
			Paid by you: Tuition \$	Student loan interest \$	Books \$
			Paid by student: Tuition \$	Student loan interest \$	Books \$
Yes	No	Did you pay any tuition for a private school for a dependent or take classes yourself? If yes, provide form 1098-T.			
Yes	No	Do you have any children who have unearned income of \$1,100 or more?			
INVESTMENTS	Yes	No	Did you, or will you, contribute any money to an IRA for 2020?	Traditional IRA	Roth IRA
	Yes	No	Did you roll over any amounts from a retirement account in 2020?		
	Yes	No	Did you sell or transfer any stock?		
	Yes	No	Did you receive any income from an installment sale?		
	Yes	No	Did you have any investments become worthless or were you a victim of investment theft in 2020?		
	Yes	No	Did you sell rental or investment property?		
DEDUCTIONS	Yes	No	Did you receive, sell, send, exchange, or otherwise acquire any financial interest in any virtual currency?		
	Yes	No	Did you, or do you plan to, contribute money before April 15, 2021 to a HSA for 2020? If yes, provide details.		
	Yes	No	Did you pay any interest on a loan for a boat or RV that has living quarters? If yes, provide details.		
	Yes	No	Did you pay sales taxes on a major purchase in 2020, such as a vehicle, boat, or home?		
BUSINESS	Yes	No	Did you make any charitable contributions in 2020? If yes, provide details.		
	Yes	No	Are you answering these questions truthfully and to the best of your knowledge?		
	Yes	No	Did you receive income from a sharing/gig economy activity (e.g. Airbnb, Uber, etc.)		
HOME	Yes	No	Do you own a business or an interest in a partnership, corporation, LLC, farming activities, or other venture?		
	Yes	No	Did you purchase or sell a main home during the year? If yes, provide final closing statement.		
	Yes	No	If you sold a home, did you claim the First-Time Homebuyer Credit when it was purchased? If yes, provide details.		
	Yes	No	Did you refinance a mortgage or take a home equity loan? If yes, provide final closing statement.		
	Yes	No	Did you use any mortgage loan proceeds for purposes other than to buy, build, or substantially improve your home?		
	Yes	No	Did you make any new energy-efficient improvements to your home? If yes, provide contract/certification.		
	Yes	No	Do you rent your home?		
Yes	No	Do you own your home?			
Yes	No	For 2020, were you a full year California resident? If no, provide details.			

County of residence: (Circle One) Riverside San Diego San Bernardino
 Los Angeles Orange Other _____

Signature: _____