REQUIRED INDIVIDUAL QUESTIONNAIRE

If any of the following items pertain to you or your spouse or registered domestic partner (RDP) for tax year 2018, please check the appropriate box and provide additional information as necessary.

PERSONAL INFORMATION:	
1. Did your marital status change during the year?	☐ Yes ☐ No
2. Did your address change during the year?	☐ Yes ☐ No
3. Could you be claimed as a dependent on another person's tax return for 2018?	☐ Yes ☐ No
4. Are you a Registered Domestic Partner with the California Secretary of State?	☐ Yes ☐ No
5. Are there any changes to your bank account information used for tax refund direct deposits or electronic tax payments?	☐ Yes ☐ No
DEPENDENTS:	
6. Were there any changes in dependents?	☐ Yes ☐ No
7. Were any of your unmarried children who might be claimed as dependents 19 years of age or older (or 24 or older if student) at the end of 2018?	☐ Yes ☐ No
8. Did you have any children under age 19 or full-time students under age 24 at the end of 2018, with interest and dividend income in excess of $1,050, or total investment income in excess of $2,100?	☐ Yes ☐ No
9. Did you have any adoption related expenses in 2018?	☐ Yes ☐ No
10. Did you support anyone other than your children?	☐ Yes ☐ No
11. Did you sponsor a foreign exchange student in 2018?	☐ Yes ☐ No
HEALTHCARE COVERAGE:	
12. Did you and your dependents have health care coverage for the full-year 2018?	☐ Yes ☐ No
13. Did you receive any of the following IRS documents: Form 1095-A (Health Insurance Marketplace Statement), 1095-B (Health Coverage) or Form 1095-C (Employer Provided Health Insurance Offer and Coverage)? If yes, please provide us with copies.	☐ Yes ☐ No
14. If you or your dependents did not have health care coverage during the year, do you fall into one of the following exemption categories: Indian tribe membership, health sharing ministry membership, religious sect membership, incarceration, exemption non-citizen or economic hardship? If you received an exemption certificate, please provide us with a copy.	☐ Yes ☐ No
INCOME:	
15. Did you receive unreported tip income of $20 or more in any month?	☐ Yes ☐ No
16. Did you cash any Series EE U.S. savings bonds issued after 1989 and pay qualified higher education expenses for yourself, your spouse, or your dependents?	☐ Yes ☐ No
17. Did you receive any non-taxable sick pay or disability income?	☐ Yes ☐ No
18. Did you receive proceeds from a lawsuit or settlement?	☐ Yes ☐ No

19. Did you receive or pay any alimony or separate maintenance payments under a valid divorce decree?	☐ Yes ☐ No
20. Did you have any foreign income or pay any foreign taxes?	☐ Yes ☐ No
21. Did you receive any unemployment compensation?	☐ Yes ☐ No
22. Did you receive any bartering income?	☐ Yes ☐ No
23. Did you receive any installment payments on property sales that occurred prior to 2018?	☐ Yes ☐ No
24. Did you have any other income that was not disclosed on forms W-2 or 1099?	☐ Yes ☐ No
PURCHASES, SALES AND DEBT:	
25. Did you purchase rental or royalty property in 2018?	☐ Yes ☐ No
26. Did you buy or sell any stocks, bonds or other investment property in 2018?	☐ Yes ☐ No
27. Did you purchase, sell, or refinance your principal or second home, or did you take a home equity loan?	☐ Yes ☐ No
28. If you sold a home in 2018, had you previously claimed any federal or state tax credit on the home sold?	☐ Yes ☐ No
29. Did you make any residential energy-efficient improvements or purchases involving solar, wind, geothermal or fuel cell sources?	☐ Yes ☐ No
30. Did you have any debts cancelled or forgiven? (This would include a home foreclosure or short sale or loan modification which decreased the amount of principal on your loan)	☐ Yes ☐ No
31. Did anyone owe you money which had become uncollectible?	☐ Yes ☐ No
32. Did you pay sales or use tax on the purchase of a vehicle, boat, aircraft or other special item in 2018?	☐ Yes ☐ No
RETIREMENT PLANS:	
33. Did you receive a distribution from a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.)?	☐ Yes ☐ No
34. Did you transfer or rollover any amount from one retirement plan to another retirement plan?	☐ Yes ☐ No
35. Did you make a contribution to a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.)?	☐ Yes ☐ No
36. Did you convert part or all of your traditional, SEP, or SIMPLE IRA to a Roth IRA in 2018?	☐ Yes ☐ No
37. Did you or are you interested in contributing any IRA proceeds directly to charity?	☐ Yes ☐ No
EDUCATION:	
38. Did you receive a distribution from an Education Savings Account or a Qualified Tuition Program?	☐ Yes ☐ No
39. If you are a teacher, did you incur classroom related expenses?	☐ Yes ☐ No
40. Did you pay interest on education/student loans?	☐ Yes ☐ No
41. Did you, your spouse, or a dependent incur any tuition expenses or books and supplies that are required to attend a college, university or vocational school? Please provide us with form 1098-T received from the educational institution. Form 1098-T is now required in order to claim a deduction or credit.	☐ Yes ☐ No
ITEMIZED DEDUCTIONS:	
42. Did you incur a loss because of damaged or stolen property?	☐ Yes ☐ No

43. Did you work out of town for part of the year?	☐ Yes ☐ No
44. Did you use your car on the job (other than to and from work)?	☐ Yes ☐ No
45. If you want to claim unreimbursed mileage for business/work did you maintain mileage logs? Mileage logs are required to substantiate business/work related use of vehicles. Estimates are not allowed.	☐ Yes ☐ No
46. Did you make any monetary (ie. cash, check, credit card, etc) charitable contributions?	☐ Yes ☐ No
47. Did you make any nonmonetary (i.e. property) charitable contributions and if so, can you prove they were in good condition?	☐ Yes ☐ No
48. If you made any monetary or nonmonetary charitable contributions, do you have the required documentation and substantiation as outlined in our Tax Preparation Checklist?	☐ Yes ☐ No
49. California allows you to make a voluntary charitable contribution by entering an amount next to the charity you select directly on the income tax return forms. Do you want to make a contribution for 2018?	☐ Yes ☐ No
50. Did you incur Mortgage Insurance Premiums with a new loan in 2018?	☐ Yes ☐ No
51. Did you pay points to purchase a home or refinance a mortgage in 2018?	☐ Yes ☐ No
52. Do you have a total mortgage balance borrowed against your home in excess of $750,000?	☐ Yes ☐ No
ESTIMATED TAXES:	
53. Did you apply an overpayment of 2017 taxes to your 2018 estimated tax (instead of being refunded)?	☐ Yes ☐ No
54. If you have an overpayment of 2018 taxes, do you want the excess applied to your 2019 estimated taxes instead of being refunded?	☐ Yes ☐ No
55. Did you make any IRS or state estimated tax payments for 2018?	☐ Yes ☐ No
56. Do you expect your 2019 taxable income and withholdings to be different from 2018?	☐ Yes ☐ No
RENTAL PROPERTY AND BUSINESS OWNERS:	
57. Did you pay any independent contractors for their services in 2018?	☐ Yes ☐ No
58. Did you provide Form 1099's to all independent contractors and unincorporated vendors for which you paid via cash or check $600 or more during the tax year? Payments made via credit card are excluded. Significant penalties may apply for not issuing Form 1099's or misclassifying employees as independent contractors. We will not be responsible for advising you with respect to independent contractor status as part of our services. If you have any questions regarding the classification of employees versus independent contractors, we strongly encourage you to consult with legal counsel experienced in employment practice matters.	☐ Yes ☐ No
59. Did you start a business or farm or acquire an interest in a business, entity or trust?	☐ Yes ☐ No
60. Did you purchase or dispose of any rental or business assets (furniture, equipment, vehicles, real estate, etc.), or convert any personal assets to rental or business use?	☐ Yes ☐ No
FOREIGN ITEMS INCLUDING CRYPTOCURRENCY (i.e. BITCOINS):	
61. Did you have an interest in or signature or other authority over a financial account in a foreign country, such as a bank account, securities account, or other financial account?	☐ Yes ☐ No
62. Was the aggregate value of all foreign accounts in which you have authority over equal to or in excess of $10,000 on any calendar day in 2018?	☐ Yes ☐ No
63. Did you receive a distribution from, or were you the grantor of, or transferor to, a foreign trust?	☐ Yes ☐ No

64. Do you have an interest in a "specified foreign financial asset" in which the aggregate value of all such assets is greater than $50,000? (For example securities issued by foreign persons, interest in a foreign entity, any financial instrument or contract held for investment that has a foreign issuer or counterparty)	☐ Yes ☐ No
65. Are you an officer, director, shareholder, or trustee or have any other interest in a foreign entity or trust?	☐ Yes ☐ No
66. Did you hold or invest in any cryptocurrency (i.e. bitcoins) as of 12/31/17?	☐ Yes ☐ No
67. Did you acquire, dispose or trade in any cryptocurrency (i.e. bitcoins) in 2018?	☐ Yes ☐ No
MISCELLANEOUS:	
68. Do you (and your spouse or RDP) want to allocate $3 to the Presidential Election Campaign Fund?	☐ Yes ☐ No
69. Was your home rented out or used for business?	☐ Yes ☐ No
70. Are you a member of the Armed Forces of the United States on active duty who moved pursuant to a military order related to a permanent change of station?	☐ Yes ☐ No
71. Did you engage the services of any household employees?	☐ Yes ☐ No
72. Did you receive a notice from or were you audited by either the IRS or a State taxing agency?	☐ Yes ☐ No
73. Did you make any gifts to an individual that total more than $15,000, or any gifts to a trust?	☐ Yes ☐ No
74. Did you purchase merchandise outside of California or over the internet where no sales tax was paid?	☐ Yes ☐ No
75. Did you (or someone on your behalf, including your employer) make contributions to a health savings account (HSA) this year? Or, did you receive an HSA distribution or acquire an interest in an HSA due to the death of the account beneficiary?	☐ Yes ☐ No
76. Did you have a medical savings account (MSA), a Medicare Advantage MSA, or acquire an interest in an MSA, or a Medicare Advantage MSA because of the death of the account holder? Or, were you a policyholder who received payments under a long-term care (LTC) insurance contract or received any accelerated death benefits from a life insurance policy?	☐ Yes ☐ No
77. Did you pay any credit card or debit card fees when paying Federal or state income taxes electronically or by phone?	☐ Yes ☐ No
78. Did you receive a distribution from an Achieving a Better Life Experience (ABLE) savings account?	☐ Yes ☐ No
ESTATE & FINANCIAL PLANNING:	
79. Are you interested in meeting with a professional mortgage advisor to review current mortgage rates and your mortgage loan situation?	☐ Yes ☐ No
80. Are you interested in meeting with a professional investment advisor to review your financial plan, investment performance and retirement goals?	☐ Yes ☐ No
81. Are you interested in meeting with a professional insurance advisor to review your financial insurance coverage, including life, disability, and long-term care insurance?	☐ Yes ☐ No
82. Have you established a will and/or trust?	☐ Yes ☐ No
83. If you do not have an established will or trust would you be interested in more information about them?	☐ Yes ☐ No
84. If you already have a will and/or trust, are you interested in meeting with a professional estate planning attorney to ensure it is up to date based on your current family and financial situation and based on current estate tax laws?	☐ Yes ☐ No

ADDITIONAL QUESTIONS OR COMMENTS:

REQUIRED SIGNATURES:

TAXPAYER(S) DATE

TAXPAYER(S) DATE