

## 2019 Tax Questionnaire

- Y N Do you own Cryptocurrency or have you made any transactions involving Cryptocurrency?
- Y N Did you get any of your healthcare coverage through the Health Insurance Marketplace?
- Y N Did your marital status change during the year?
- Y N Were there any changes in dependents?
- Y N Do you or your spouse want to allocate \$3 to the Presidential Election Campaign Fund?
- Y N Did you receive unreported tip income of \$20 or more in any month?
- Y N Did you receive any disability income?
- Y N Did you have any foreign income or pay any foreign taxes outside of investments?
- Y N 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?
- Y N Did you start a business or farm, purchase rental or royalty property, or acquire an interest in a partnership, S corporation, trust, or REMIC?
- Y N Did you purchase or dispose of any business assets (furniture, equipment, vehicles, real estate, etc.), or convert any personal assets to business use?
- Y N Did you buy or sell any stocks, bonds or other investment property in 2019?
- Y N Did you purchase, sell, or refinance your principal home or second home, or did you obtain a home equity loan?
- Y N Did anyone owe you money which has become uncollectible?
- Y N Did you have any debts canceled or forgiven?
- Y N Did you incur a loss because of damaged or stolen property?
- Y N Did you use your car on the job (other than to and from work)?
- Y N Was your home rented out or used for business?
- Y N Did you, your spouse, or a dependent incur any tuition expenses that are required to attend a college, university, or vocational school?
- Y N Did you or your spouse make any gifts to an individual that total more than \$15,000 or any gifts to a trust?
- Y N Did you or 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?
- Y N Did you make any residential energy-efficient improvements involving solar, wind, geothermal or fuel cell energy sources?
- Y N Were you notified or audited by either the Internal Revenue Service or the State taxing agency?
- Y N Do you have a current financial plan?

COMMENTS: (How we can better serve you, Other services you would like etc.)

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