

If any of the following items pertain to you or your spouse for 2022, please check the appropriate box and provide additional information if necessary.

- | Yes | No | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Did your marital status change during the year? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did your address change during the year? |
| <input type="checkbox"/> | <input type="checkbox"/> | Could you be claimed as a dependent on another person's tax return? |
| <input type="checkbox"/> | <input type="checkbox"/> | Were there any changes in dependents? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have any out of state purchases subject to California Sales tax that were not paid? If so, please list the purchases on the "additional information" sheet at the end of this organizer |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you or your dependents have healthcare coverage for the full-year of 2022? |
| <input type="checkbox"/> | <input type="checkbox"/> | 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 so, please attach. |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you buy or sell any stocks, bonds or other investment property? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you purchase, sell, or refinance your principal home or second home, or did you take a home equity loan? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you add any energy efficient improvements (insulation systems, exterior windows and doors, metal roofs) to your home during 2022 |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive a distribution from or make a contribution to a retirement plan (401(k), IRA, etc.)? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you, your spouse, or a dependent incur any tuition expenses that are required to attend a college, university, or vocational school? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you use your car on the job (other than to and from work)? |
| <input type="checkbox"/> | <input type="checkbox"/> | May the IRS discuss your tax return with your preparer? |
| <input type="checkbox"/> | <input type="checkbox"/> | Please be sure to list your DMV fees paid for the year under "Taxes Paid - Other" or attach your DMV bill copies. |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you pay all or some of your tax estimates that were requested of you from the prior year tax return? If so, please list them on the following pages where requested. |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have any funds in a foreign account? If so, please describe it in the last page "Additional Information" |