

ANNUAL CLIENT UPDATE CHECKLIST 202__

FULL NAME, ADDRESS AND EMAIL OF TAXPAYER

| Question | yes/no | Explain |
|------------------------------------------------------------------------------------------------------------------------|--------|---------|
| Did you pay any daycare expenses? If so, how much and what is the daycare's EIN. | | |
| Do you own property other than your primary residence? | | |
| Did you buy or sell any real property last year? | | |
| Did you buy a new energy efficient air conditioner, windows, roof, or solar equipment? | | |
| Did you buy an electric car? | | |
| Did you engage in any transaction using virtual currency? | | |
| Did you or do you want to contribute to an IRA? Roth or regular? | | |
| Do you have any foreign bank accounts in your name with more than \$10K. If so, which ones and how much max last year? | | |
| Is there anything different in your tax life last year? | | |
| Are there any changes we need to discuss for this year? | | |
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