

Name _____

Mandatory organizer questions – please answer all every year

These questions must be answered on your tax return

Yes No

Foreign Accounts

- 1. Do you have a foreign bank account? Yes No
- 2. Do you have funds of any financial kind in a foreign country over \$10,000? Yes No
- 3. Do you have assets of any kind in a foreign country over \$50,000 (single)/\$100,000 (married joint)? Yes No

Sales Tax

- 4. Did you purchase anything online, by catalog, from T.V. on which you did NOT pay sales tax? Yes No
- 5. If so, what was the total amount of such purchases? _____
- 6. What was your COUNTY tax rate of residence in 2025? _____

- 7. Did you have full coverage health insurance in 2025? Yes No
If yes, please bring form 1095 from your insurer when received

Rental you own

- 8. Did you make any payments over \$600 for services that requires you to file form 1099? Yes No
(gardener, handyman, etc.) (Corporations are exempt)
- 9. Did you or will you file the required forms 1099 and 1096? Yes No
- 10. Days rented at fair rental value (for each rental) _____
- 11. Days of personal use _____

Business you own

- 12. Did you make any payments over \$600 for services that requires you to file form 1099? Yes No
- 13. Did you or will you file the required forms 1099 and 1096? Yes No
- 14. Did you sell any bitcoins or any virtual currency, not included on a form 1099? Yes No
If yes, we need your cost basis, sales price and dates bought and sold

NOTE If you mail us your tax information please include this page and questionnaire from the organizer.