

2022 INCOME TAX GUIDE  
GENERAL INFORMATION

TAXPAYER \_\_\_\_\_  
FIRST INITIAL LAST

SPOUSE \_\_\_\_\_  
FIRST INITIAL LAST

ADDRESS \_\_\_\_\_  
STREET ADDRESS OR P.O. BOX NUMBER

CITY \_\_\_\_\_ STATE \_\_\_\_\_ ZIP CODE \_\_\_\_\_ COUNTY \_\_\_\_\_

HOME PHONE \_\_\_\_\_ CELL \_\_\_\_\_ BUSINESS \_\_\_\_\_

TAXPAYER SSN \_\_\_\_\_ TAXPAYER BIRTHDATE \_\_\_\_\_

SPOUSE SSN \_\_\_\_\_ SPOUSE BIRTHDATE \_\_\_\_\_

E-MAIL ADDRESS \_\_\_\_\_

REFERRED BY: \_\_\_\_\_

**DEPENDENTS:**

- IF INCOME IS MORE THAN \$2,200.00 PER CHILD, PLEASE BRING CHILD'S 1099's & W2's

<u>NAME</u>	<u>DATE OF BIRTH</u>	<u>SOCIAL SECURITY NUMBER</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

**E-FILING? YES / NO (CIRCLE ONE)**

- Note: We will e-file unless you tell us not to.
- Please provide us with the E-filing PIN if you received one from the IRS

**DIRECT DEPOSIT REFUND? YES / NO (CIRCLE ONE)**

- If yes, we will need a cancelled check to get routing and account numbers

**FOREIGN BANK OR INVESTMENT ACCOUNTS:**

- If the total value of these accounts combined exceeds \$10,000 at any time during 2022, we need to report them. Failure to do so could result in substantial penalties.

**HEALTH INSURANCE COVERAGE:**

- Please provide all Forms 1095A, 1095B and 1095C that you received
- The penalty for not having health insurance does not apply for 2022 tax returns. However, if you purchased insurance through the government exchange we will need to reconcile any advance premium credit that you received.

## CHECKLIST OF ITEMS NEEDED

### INCOME:

1. W-2's & W-2G's (for gambling winnings)
2. 1099'S:
  - 1099-INT for interest income
  - 1099-DIV for dividend income
  - 1099-B for stock & mutual fund sales
  - 1099-NEC for self-employment income
  - 1099-MISC for rental and other income
  - 1099-R for retirement income and annuities
  - 1099-G for state unemployment
  - 1099-G for state income tax refunds
  - 1099-K for payment card and third-party network transactions
  - SSA-1099 for Social Security or disability benefits
  - 1099-Q for distributions from 529 plans
3. SCHEDULE K-1'S:
  - Partnerships
  - S-Corporations
  - Trusts, Estates & Other Fiduciaries
4. DIGITAL ASSETS:
  - Digital Assets include any cryptocurrencies, non-fungible tokens (NFT's), etc.
  - Please let us know if you had any of the following transactions regarding digital assets in 2022:
    - Sold, exchanged, gifted or otherwise disposed of a digital asset OR
    - Received any digital asset as a reward, award or payment for property or service
  - Note – if you just purchased a digital asset through a brokerage account and did not sell it during 2022, we don't need to know about that.
5. MISCELLANEOUS RECORDS:
  - Self-employed business revenue and expenses
  - Settlement statements for real estate purchases and sales
  - Rental income and expenses
  - Farm income and expenses
  - Alimony paid or received
  - Conversion of a traditional IRA to a Roth IRA

### DEDUCTIONS:

1. MEDICAL AND DENTAL EXPENSES
  - Please provide all Forms 1095A, 1095B and 1095C
2. REAL ESTATE TAXES
3. PERSONAL PROPERTY TAXES
4. FORM 1098 FOR MORTGAGE INTEREST PAID
5. STATEMENT SHOWING INVESTMENT INTEREST PAID IN 2022

6. CHARITABLE CONTRIBUTIONS

- No deduction is allowed for any contribution of cash, check or other monetary gift unless the donor can show a bank record or a written communication from the charity indicating the amount and date of contribution.
- For any single donation of \$250 or more, you must have a written acknowledgement from the charity.
- For all non-cash donations (i.e. Goodwill) we will need an approximate fair market value of the contribution on the date contributed.

7. GAMBLING LOSSES

- Please provide all records substantiating gambling losses
- Note that gambling losses are only deductible to the extent of gambling winnings for taxpayers who can itemize.

8. DEPENDENT CARE EXPENSES (FOR YOUR CHILD UNDER AGE 13)

- Include name of dependent and amount paid.
- Please provide the care provider’s name, address and social security number or federal ID number

9. AUTO MILEAGE LOG FOR ANY SELF-EMPLOYED BUSINESS OR RENTAL

10. FORM 1098-E FOR STUDENT LOAN INTEREST PAID

11. FORM 1098-T FOR ALL TUITION AND HIGHER EDUCATION EXPENSES

12. IRA CONTRIBUTIONS MADE IN 2022 (BOTH TRADITIONAL AND ROTH)

- Please provide Form 5498

13. HEALTH SAVINGS ACCOUNTS:

- Please provide Form 5498-SA to show HSA contributions
- Please provide Form 1099-SA to show HSA distributions

14. 529 PLAN CONTRIBUTIONS

- Please provide year-end statement showing total contribution for the year
- 529 contributions are state deductible only.

15. ENERGY EFFICIENT IMPROVEMENTS TO YOUR PRIMARY RESIDENCE

- Please provide receipt for energy efficient improvements made in 2022.
- Examples are exterior windows, exterior doors, insulation, certain types of air conditioners, furnaces, water heaters, etc.

**ESTIMATED TAXES PAID:**

<u>DATE PAID</u>	<u>FEDERAL AMOUNT PAID</u>	<u>STATE AMOUNT PAID</u>
04-15-2022 _____		
06-15-2022 _____		
09-15-2022 _____		
01-15-2023 _____		