

2022 Tax Return Information

Name _____ SS# _____ DOB _____
Spouse _____ SS# _____ DOB _____
Dependent _____ SS# _____ DOB _____
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Dependent _____ SS# _____ DOB _____
Address _____ City _____ Zip _____
Phone: _____ Email: _____
Your Occupation: _____ Spouse's: _____

Documents required to be sent to the CPA:

- W2's or 1099's** - Received from employers
- 1099-DIV or INT** - Bank & Investment statements (received Jan 2023)
- Form-1099-B** - Stock and mutual fund sales (received Jan 2023)
- Form 1098** - Mortgage interest statement
- Form 1099-SA** IF you used HSA account for medical expenses in 2022
- Form 1098-T** College tuition fees statement

Special notes/questions for me this year: _____

If you want refund quickly direct-deposited

Routing #: _____ Acct #: _____

I. INCOME

1. Contractor Income / Side-work (**NOT your w2**) – Ask Ken for “Business Checklist”
2. Rental income – Ask Ken for “Rental Checklist”
3. Did you take any money **out of** an IRA or 401K in 2022? SEND ME THE 1099-R
4. Did you acquire or sell any virtual currency in 2022? YES/NO

II. DEDUCTIONS/TAX CREDITS

1. Medical expenses ONLY if more than 7.5% of your income \$ _____
2. Amounts paid for county taxes paid for **house** \$ _____ & all **vehicles** \$ _____
3. Charitable Donations - Cash \$ _____ and Goods \$ _____ ←Do NOT exceed \$500
4. Traditional **IRA** contributions: \$ _____ **Do not include ROTH IRA/401k**
5. Daycare: Amount paid: \$ _____ Facility's Federal Tax ID # _____
Facility Name and FULL Address: _____
Did you use Flexible Spending Account to pay for any of this? Circle YES or NO