

2022

1040

US

## Miscellaneous Questions

Please check the appropriate box and provide additional information if necessary.

### PERSONAL INFORMATION

Yes No

- Do you want a PDF copy of your return emailed to you instead of a paper copy?
- Did your marital status change during the year?
- Did your address change during the year? If YES, provide new address.

### DEPENDENTS

- Were there any changes in dependents?
- Were any of your unmarried children who might be claimed as dependents 19 years of age or older at the end of 2022?
- Were the 19 to 23 year old dependents full-time students?
- Did you have any children under age 19 or full-time students under age 24 at the end of 2022 with interest, dividends, capital gains, and other investment income in excess of \$1,150, or total investment income in excess of \$2,300?
- Did you pay child care cost for a dependent child under age 13 or for a handicapped individual so you could work?
- Have you released the child tax credit to any other person?
- Did any of your dependents live with you for less than SIX months?

### HEALTH CARE COVERAGE

- Did you and all your dependents have health insurance for the entire year
- Did you receive IRS document 1095-A (Health Insurance Marketplace Statement), if yes provide form(s) 1095-A

### INCOME

- Did you have any self employment income in 2022 or expect to have any in 2023?
- Do you have any investments that report income on a K-1. If YES, include **ALL** pages you receive in your tax documents.
- Did you receive any disability income? If yes explain.
- Did you receive any unemployment income? If yes, provide form 1099-G.

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At any time in 2022 did you a) receive, b) sell, exchange or otherwise dispose of a digital asset i.e. Crypto-currency. If YES, provide gain/loss report.

Do you expect your 2023 taxable income or withholdings to be significantly different from 2022? If yes, please explain.

**PURCHASES, SALES AND DEBT**

**Yes    No**

Did you start a business or farm, purchase rental or royalty property, or acquire an interest in a partnership, S corporation, trust, or REMIC?

Did you sell any stocks, bonds or other investment property in 2022? If yes, provide a description, the cost or tax basis, the date acquired, and the 2022 1099-B

Did you purchase, sell, or refinance your principal home or second home, or did you take out a home equity loan? If yes, provide the settlement statement. If cash was received from a refinance or equity loan provide the amount of the funds that were used to buy or improve your personal residence. \$ \_\_\_\_\_

Did you pay mortgage payments in 2022? If YES, provide mortgage statement form 1098.

What is your mortgage ending balance for each loan as of December 31, 2022. \$ \_\_\_\_\_ If unknown call your lender to obtain. The balance in box 2 of the mortgage statement is **NOT** the ending balance, it is the beginning of the year balance.

Did you make any residential energy-efficient improvements or purchases involving solar, wind, geothermal, or fuel cell property? If YES, provide description, cost and date.

**RETIREMENT PLANS**

Did you receive a distribution from any retirement plan, such as 401(k), IRA, SEP, SIMPLE, Qualified Plan, OPM, etc.? If yes, provide forms 1099-R.

Did you receive retirement income for military, law enforcement, fire, rescue, or emergency service?

Did you make a contribution to a retirement plan, such as IRA, SEP, SIMPLE, Qualified Plan, etc.? If yes, how much? \$ \_\_\_\_\_ For what type of plan? \_\_\_\_\_

Is the Retirement contribution listed in the question above on your W-2?

Did you transfer or rollover any amount from one retirement plan to another retirement plan? If yes explain.

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## EDUCATION

Yes No

- Did you receive a distribution from an Education Savings Account or a Qualified Tuition Program?
- Did you, your spouse, or a dependent incur any tuition expenses that are required to attend a college, university, or vocational school? If yes, provide 1098-T and copy of school's list of payments made or other documents to substantiate payments made.
- Did you incur any expenses working as a teacher, counselor, or principal for classes kindergarten through grade 12? If yes, how much \$ \_\_\_\_\_.
- Did you contribute to a 529 education plan or a Coverdell Education Savings account? If yes, how much \$ \_\_\_\_\_ to which state fund \_\_\_\_\_ Provide a list of names, social security numbers and amounts.

## ITEMIZED DEDUCTIONS

- Did you make a charitable cash contribution of \$250 or more? If yes, provide receipts. Provide even if you file using the standard deduction.
- Did you donate property with a fair market value of \$500 or more to a charity? If yes, provide a donation receipt along with a list of the property donated with the date acquired, original cost and the fair market value when contributed.
- Do you have a Health Savings Account (HSA) medical insurance plan? If yes, provide forms 5498 and 1099-SA.

## TAX PAYMENTS AND REFUNDS

- Did you pay any 2022 estimated taxes? If YES, fill in the amounts and dates on the Tax Organizer.
- If you have an overpayment of 2022 taxes, do you want the excess applied to your 2023 estimated tax (instead of being refunded)
- Do you want direct deposit if you have a refund and are not applying the refund to 2023?
- Is your current bank account information the same as last year? If not edit the account information in the Tax Organizer
- Do you want the balance you owe for 2022 electronically withdrawn from your bank account? If yes, what date do you want it withdrawn \_\_\_/\_\_\_/2023.
- Do you want your 2023 estimated taxes automatically withdrawn from your bank account on the due dates?

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## MISCELLANEOUS

Yes

No

Do you want to **elect out** of electronically filing your tax return? If yes, you will need to sign an election form which will be provided to you.

Do you want to allocate \$3 to the Presidential Election Campaign Fund?

Does your spouse want to allocate \$3 to the Presidential Election Campaign Fund?

May the IRS discuss your tax return with your preparer?

Did you have an interest in or signature or other authority over a financial account in a foreign country, such as a bank account, securities account, Trust or other financial account?

Was the cumulative value of ALL the foreign accounts for 2022 \$10,000 or more? If yes, provide the account information and amounts.

Was your home used for business in 2022?

Did you receive any rental income in 2022?

Did you pay any household employee, nanny or maid a \$2,400 or more in 2022?

Were you notified or audited by either the Internal Revenue Service or a State taxing agency?

Did you or your spouse make any gifts to an individual or Trust that total more than \$16,000?