2022 Tax Organizer Personal Information

Spouse Street address, city, state, and ZIP Occupation	Spouse Taxpayer email Spouse email Filing status at the end of 2022 Single Married Widowed - If widowed and your spouse died in 2022, enter the date of death Married filing separately - If married but filing separately, did you live apart from your spouse for the last six months of 2022? Yes No Are you or your spouse blind? Are you or your spouse disabled? Are you or your spouse a full-time student? Do you or your spouse want to designate \$3 to go to the Presidential Election Campaign Fund? At any time during 2022 did you: (a) receive (as a reward, award, or payment for property or service) a digital asset (b) sell, exchange, gift, or otherwise dispose of a digital asset (or a financial interest in a digital asset)	Cell phone			
Cell phone Cel	Occupation Daytime phone Evening phone Surpayer email Single Married Miling separately - If married but filling separately, did you live apart from your spouse for the last six months of 2022? Are you or your spouse disabled? Are you or your spouse a full-time student? Daytime phone Evening phone	Cell phone			
Occupation Daytime phone Evening phone Call phone Appayer	Occupation Daytime phone Evening phone Taxpayer Spouse Sp	Cell phone			
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axpayer email pouse	axpayer email Sipouse email Sipouse email Sipouse email Sipouse email Sipouse email Sipouse email Single	Cell phone			
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axpayer email	isiling status at the end of 2022 Single Married Widowed - If widowed and your spouse died in 2022, enter the date of death Married filing separately - If married but filing separately, did you live apart from your spouse for the last six months of 2022? The state of 2022? The state of 2022 of 2022 of 2022? The state of 2022 of 2022 of 2022? The state of 2022 of				
Single	Single				
Single Married Widowed - If widowed and your spouse died in 2022, enter the date of death Married filing separately - If married but filing separately, did you live apart from your spouse for the last six months of 2022? Are you or your spouse blind? Are you or your spouse disabled? Are you or your spouse a full-time student? Do you or your spouse a full-time student? Do you or your spouse want to designate \$3 to go to the Presidential Election Campaign Fund? At any time during 2022 did you: (a) receive (as a reward, award, or payment for property or service) a digital asset (b) self, exchange, gift, or otherwise dispose of a digital asset (or a financial interest in a digital asset) Married filing separately - If married but filing support for property or service) and digital asset (b) self, exchange, gift, or otherwise dispose of a digital asset (or a financial interest in a digital asset) Married filing separately - If married but filing separately, did you investigate the property or service) and digital asset (b) self, exchange, gift, or otherwise dispose of a digital asset (or a financial interest in a digital asset) Married filing separately - If married but filing separately, did you investigate for a financial interest in a digital asset) Married filing separately - If married filing separately, did you investigate for a financial interest in a digital asset (b) self, exchange, gift, or otherwise dispose of a digital asset (or a financial interest in a digital asset) Married filing separately - If married filing separately, did you investigate for a financial interest in a digital asset (b) self, exchange filing separately - If married filing separately, did you investigate for a financial interest in a digital asset (b) self, exchange filing separately - If married filing separately	Single				
Single Married Widowed - If widowed and your spouse died in 2022, enter the date of death Married filing separately - If married but filing separately, did you live apart from your spouse for the last six months of 2022? No	Single				
Photo ID number Photo ID number State photo ID was issued State photo ID was issued Date photo ID was issued Date photo ID expires Date photo ID expires Account Information for Deposits and Withdrawals Name of bank Bank routing number Recount number Recount Information					
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Account Information for Deposits and Withdrawals Name of bank Bank routing number Bank account number Type of account Use this account for Checking Savings Deposits Withdrawal Withd	ate photo ID was issued Date photo ID was issued	Date photo ID was issued			
Name of bank Bank routing number Bank account number Type of account Use this account for	ate photo ID expires Date photo ID expires				
Name of bank routing number account number Checking Savings Deposits Withdrawa Appointment Information	Account Information for Deposits and Withdrawals				
Appointment Information	Name of hank				
Applitute (Information)	Touring number account number Checking Savings Depo	osits vvitnaraw			
our 2022 appointment is scheduled for	Appointment Information				
	our 2022 appointment is scheduled for	Commission of the Commission			

	Income	
Name:	SSN	•
Wage	es & Salaries	
	e all copies of Form W-2	2022 federal
TS	Employer name	wages

Aboutomont		
Potir	rement	
Provide	e all copies of Form 1099-R	
T 0	Payer name	2022 distribution
TS	rayer name	4.00.104.101.

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	Yes Did you take a distribution from an IRA and give it to an organization eligible to receive tax-deductible contribution	ons?
L	Yes No Did you use any of the distributions for disaster relief?	
-		

	Income		
Name:		SSN:	
Divid	fend Income e all copies of Form 1099-DIV and other statements that report dividend income.		
Provide	Account number	2022 ordinary	2022 qualified
TSJ	Payer name	dividends	dividends
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Inte	rest Income		
	le all copies of Form 1099-INT, Form 1099-OID, and other statements that report interest income. Account number		2022 interest
TSJ	Payer name		Interest
			····
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Ifany	y interest income listed above is from a seller-financed mortgage, provide the payer's ID number and address		

Other Income and Adjustments		
Name:	SSN:	:
Other Income		araraya wa sarra
	2022 Taxpayer	2022 Spouse
Social Security Benefits (attach Forms 1099-SSA)		
Railroad Retirement Benefits (attach Forms 1099-RRB)		
State income tax refund (attach Forms 1099-G)		
Alimony received Divorce or separation date Amount		
Unemployment compensation (attach Forms 1099-G)		
Unemployment compensation repaid in 2022		
Gambling winnings (attach Forms W2-G)		
Alaska Permanent Fund		
Jury duty pay		
ABLE distributions		
Scholarships or grants not reported on Form W-2		
Other income:		
Adjustments Educator expenses (If you are an educator, enter the amount you paid for classroom supplies)	2022 Taxpayer	2022 Spouse
Contributions made to a Health Savings Account (HSA)		
Payments made for Self-Employed Health Insurance for you, your spouse, or dependents		
Alimony paid		
Name		
Name		
SSN Divorce or separation date	,	
Contributions made to a Self-Employed Pension plan (SEP), SIMPLE, or Solo 401K		
Contributions made to an Individual Retirement Account (IRA)		
Contributions made to a Roth IRA		
Interest paid on a student loan · · · · · · · · · · · · · · · · · · ·		
Other adjustments:		

Schedule A - Itemized Deductions SSN: Name: Charitable Contributions Medical and Dental Expenses Health insurance premiums Donations to charity Cash Noncash Amount (paid by you, not through work) Church Amount that is for Medicare premiums Boy or Girl Scouts Goodwill Long-term care premiums (your spouse) · · · · · · · · · Red Cross . П Salvation Army Mileage driven for medical purposes П United Way Veterans П Hospital Out of pocket medical & dental expenses University Prescription medicines Other Glasses & contacts Miles driven for charitable purposes Other Miscellaneous Deductions Medical equipment & supplies Amortizable bond premiums Hospital services . Federal estate tax Laboratory services . . . Gambling losses Nursing services Impairment-related work expenses Other Claim repayments Taxes Paid Unrecovered pension investments. . State and local income taxes Loss from other activities from Schedule K-1 General sales tax (vehicle, boat, home, etc.). Ordinary loss debt instrument Real estate taxes Excess deduction on termination Personal property taxes Job Expenses & Certain Miscellaneous Deductions Auto registration taxes not Necessary job expenses you paid that were not reimbursed by your deductible for state employer Other taxes (list) Safety equipment, tools, & supplies Protective clothing (shoes, hardhats, glasses, etc.) Interest Paid Dues to professional organizations Home mortgage interest paid (attach Form 1098) . . . Some of your home mortgage loan was not used to buy, build, or improve your home. Other Home mortgage interest paid to an individual Union dues . . . Paid to: Tax preparation fees Name Other nonpersonal expenses related to taxable income Address City, State, ZIP Investment expenses not entered elsewhere SSN or EIN

Points not reported on Form 1098

Other Inf	formation			
Name:				SSN:
Mortgage Interest Provide all copies of Form 1098				
	int	rtgage erest	Mortgage insurance	Real estate
TSJ Lender's name	rec	eived	premiums	taxes paid
				şi

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Employee Business Expenses				
TS	and the section of th	and the second s	an en manerier de sport en partie person de service manerier personal de service de l'appropriet de l'appropri	
Select if you are: A qualified performing artist	Select if you		1	. dd 0000
A fee-based state or local government official	∐ Used y	your persona	I vehicle for your job	during 2022
A disabled employee with impairment-related work expenses				
An Armed Forces reservist				
You are a member of the clergy	NOT reimbursed		Reimbursed by	your employer
	by your employe			box 1 of your W-2
Parking fees, tolls, local transportation				
Meals				
Overnight business travel expenses (Do not include meals & entertainment)				
Other business expenses			out of	
				CCHCC.
	are the second s		***************************************	
Casualties and Thefts				
TSJ FEMA code	TSJ	EMA code		-
Property description	Property descript	ion		
Property location	Property location	***		
Date property was acquired	Date property wa	s acquired		
Date property was damaged or stolen		-	r stolen	=
Cost of property damaged or stolen	Cost of property	damaged or s	stolen	
Fair market value before incident	Fair market value	before incid	ent	
Fair market value after incident	Fair market value	after incider	nt	
Insurance reimbursement	Insurance reimbu	ırsement		

	Other Information					
Name:			SSN:			
Health Savings Account						
TS						
The taxpayer's coverage is under a high-deductible	health plan for:		2022			
Taxpayer only Family HSA contributions made for 2022						
Total distributions from all HSAs during 2022						
Distributions included above that were rolled over in	nto another account		• •			
Qualified medical expenses paid using HSA distribu	itions		• •			
Education Expenses Provide all copies of Fo	orm 1098-T					
Student name		Student name				
Type of expense	Amount	Type of expense	Amount			
-						
Student name Student name						
Type of expense	Amount	Type of expense	Amount			
Type of expense	Amount	Type of expense	Amount			
Type of expense	Amount	Type of expense	Amount			
Type of expense	Amount	Type of expense	Amount			
Type of expense	Amount	Type of expense	Amount			
Type of expense	Amount	Type of expense	Amount			
	Amount	Type of expense	Amount			
Job-related Moving Expenses	Amount	Type of expense	Amount			
Job-related Moving Expenses TSJ Select this box and complete the fields below it.	f you are a member of	the Armed Forces on active duty,				
Job-related Moving Expenses TSJ Select this box and complete the fields below i and moved due to a military order for a perman	f you are a member of nent change of station.	the Armed Forces on active duty,	2022			
Job-related Moving Expenses TSJ Select this box and complete the fields below in and moved due to a military order for a permanant Number of miles from old home to old workplace	f you are a member of nent change of station.	the Armed Forces on active duty,	2022			
Job-related Moving Expenses TSJ Select this box and complete the fields below i and moved due to a military order for a permanular perma	f you are a member of nent change of station.	the Armed Forces on active duty,	2022			
Job-related Moving Expenses TSJ Select this box and complete the fields below in and moved due to a military order for a permanant Number of miles from old home to old workplace Number of miles from old home to new workplace Expenses to transport and store household goods	f you are a member of nent change of station.	the Armed Forces on active duty,	2022			
Job-related Moving Expenses TSJ Select this box and complete the fields below in and moved due to a military order for a permanant Number of miles from old home to old workplace Number of miles from old home to new workplace Expenses to transport and store household goods	f you are a member of nent change of station.	the Armed Forces on active duty,	2022			
Job-related Moving Expenses TSJ Select this box and complete the fields below in and moved due to a military order for a permanant Number of miles from old home to old workplace Number of miles from old home to new workplace Expenses to transport and store household goods	f you are a member of nent change of station.	the Armed Forces on active duty,	2022			
Job-related Moving Expenses TSJ Select this box and complete the fields below in and moved due to a military order for a permanant Number of miles from old home to old workplace Number of miles from old home to new workplace Expenses to transport and store household goods	f you are a member of nent change of station.	the Armed Forces on active duty,	2022			
Job-related Moving Expenses TSJ Select this box and complete the fields below in and moved due to a military order for a permanant Number of miles from old home to old workplace Number of miles from old home to new workplace Expenses to transport and store household goods	f you are a member of nent change of station.	the Armed Forces on active duty,	2022			
Job-related Moving Expenses TSJ Select this box and complete the fields below in and moved due to a military order for a permanant Number of miles from old home to old workplace Number of miles from old home to new workplace Expenses to transport and store household goods	f you are a member of nent change of station.	the Armed Forces on active duty,	2022			

Schedule C - Profit or Loss from Business Name: SSN: General Business Information Professional product or service Employer ID number Business name Business address, city, state, ZIP ☐ Accrual Other (specify) Accounting Method: Cash This business started or was acquired during 2022. This business was disposed of during 2022. Select if this business is for: Professional gambler Newspaper delivery and you are under 18 years of age A clergy **Exempt Notary income** Yes No Payments of \$600 or more were paid to an individual, who is not your employee, for services provided for this business. If "Yes," did you file Forms 1099 for the individuals? You received a Paycheck Protection Program (PPP) loan for this business. П If "Yes," was any portion of the loan forgiven? Income 2022 2022 Other income . . Returns & allowances . . 2022 2022 Repairs & maintenance Advertising Car & truck expenses Taxes & licenses Commissions & fees Utilities . . Employee benefit programs . . Insurance (other than health) Family health coverage payments for taxpayer, spouse or dependents Other expenses (list) Interest - other Legal & professional services Pension & profit sharing plans . . Rent or lease (vehicles, machinery, & equipment) Rent (other business property) Cost of Goods Sold 2022 2022 Materials & supplies Inventory at beginning of year Other costs Inventory at end of year There was a change in inventory method. Cost of labor

Schedule E - Income or Loss from Rental Real Estate & Royalties					
Name:	SSN:				
General Property Information					
TSJ Property description					
Address, city, state, ZIP					
Select the property type Single family residence Multi-family residence Commercial	Land Self-rental Royalties Other				
	property was used for personal use				
If the rental is a multi-dwelling unit and you occupied part of the unit, enter the This property was placed in service during 2022. This property was disposed of during 2022. This property is your main home or second home. This property was owned as a qualified joint venture.	No Payments of \$600 or more were paid to an individual, who is not your employee, for services provided for this rental. If "Yes," did you file Forms 1099 for the individuals?				
Encome 2022	2022				
Rent income	Royalties from oil, gas, mineral, copyright or patent				
Expenses Rental unit expenses	Rental and homeowner expenses				
Advertising	If this Schedule E is for a				
Auto & travel	a multi-unit dwelling and you lived in one unit and rented				
Cleaning & maintenance	out the other units, use the				
Commissions	"Rental and homeowner expenses" column to show				
Insurance	expenses that apply to the entire				
Legal & professional fees	property. Use the "Rental unit expenses" column to show				
Management fees	expenses that pertain ONLY to				
Mortgage interest	the rental portion of the property.				
Other interest	If the Schedule E is not for a				
Repairs	multi-unit property in which you lived in one unit, complete just				
Supplies	the "Rental unit expenses" column.				
Taxes					
Utilities · · · · · · · · · · · · · · · · · · ·					
Depletion					
	· ·				
The second secon	Ministration of the control of the control				
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	Income or Loss from Partnerships, S Corporations, and Fiduciaries				
Name:		SN:			
Part r Provide	Name: Partnerships, S Corporations, Estates and Trusts Provide all copies of Schedule K-1 and attachments				
TS	Entity name	EIN			

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Documents we need to complete your 2022 tax return:

Copies of driver's licenses for both taxpayer and spouse, if applicable All W-2s

All interest/dividend statements from your bank/financial institutions Mortgage interest statement(s)

Any new dependents' full name, date of birth and social security number Medical bills -a list or a total \$ is fine

Contributions - total cash/check is sufficient - no detail needed

Goodwill/other charities Contributions - just give us the total value of the items Car tag(s) tax

Property tax (if not included on mortgage statement)

If a new client, we need a copy of the 2021 federal and state tax returns

Home Office Expenses, if applicable:

Total Square footage of home
Square footage of office
All Hilities and Penair/Maintenance

All Utilities and Repair/Maintenance Expenses for the year