Chandler & Knowles
CPAs, PLLC

Dear Client:

This Annual Tax Organizer is designed to help you gather the information needed to prepare your 2022 personal income tax return.

Completion of the Annual Questionnaire is mandatory in order for us to begin working on your return. Answer all questions and attach a statement, when necessary, for additional information. FYI - the ability to complete the Annual Questionnaire electronically depends on which version of Adobe you have. If you're interested in this feature and need help, contact whomever assists you with computer issues.

The Annual Tax Organizer worksheets (which follow the Annual Questionnaire) are provided as a tool, and completion is not mandatory. However, please complete sections "Personal Information" and "Direct Deposit/Electronic Funds Withdrawal Information".

See "Information Needed" for Tax Preparation following the Privacy Policy. Please review it in its entirety.

FYI: The IRS doesn't **initiate** contact with taxpayers by email, text messages or social media channels to request personal or financial information. Phishing is a scam typically carried out through unsolicited email and/or websites that pose as legitimate sites and lure unsuspecting victims to provide personal and financial information. If you receive such an email from what appears to be the IRS, send a copy of the email to phishing@irs.gov. Please do not respond to the email unless the email request you send to the IRS has been verified as legitimate.

We appreciate this opportunity to serve you.

Sincerely,

Chandler and Knowles CPAs, PLLC

CHANDLER & KNOWLES
CPAs, PLLC

FAQs - Frequently Asked Questions

What do I need to provide to you for my taxes to be prepared? We need all of your supporting documents (see "Information Needed" for Tax Preparation following the Privacy Policy), the completed Annual Questionnaire, and the completed Due Diligence Questions, if applicable. See "What are the Due Diligence Questions?" below.

What are the Due Diligence Questions? IRS regulations require that we, as your tax preparer, satisfy due diligence requirements regarding certain credits and/or tax filing statuses. Include your completed Due Diligence questions with your tax information.

I completed the Annual Questionnaire last year. Do I really need to complete it again?
Yes. There are changes to tax law every year, and each year's Annual Questionnaire captures those tax law changes. Additionally, the Annual Questionnaire is designed to ensure you're taking advantage of all allowable tax deductions and/or credits!

Is there a way to complete the Annual Questionnaire electronically? Yes - it depends on which version of Adobe you have. Whomever assists you with computer issues should be able to help you.

How do I get my documents to you?

** Do not send documents or sensitive information via email - for your security and ours. **

1. Upload to the Client Portal via our website:
   https://www.ChandlerKnowlesCPA.com/clients/client-secure-document-portal-2/
   Or Scan QR Code:

2. Drop them off at our office. Should you arrive after hours, you can place them in the locked drop box next to our front door. Please do not include staples, paper clips, or unopened envelopes.

I delivered my documents to your office. How are my documents returned to me? Due to security concerns, you will need to pick up any hard copies delivered to our office within 3 weeks of your tax return being filed. Any documents that have not been picked up from our office by the 4th week will be shredded. If you have extenuating circumstances and need additional time, we can definitely accomodate you. Please contact our office.

Note that all documents used for tax preparation are available to you via the Portal.

I have moved. Can you still do my taxes? Yes! We have many clients outside of the DFW area and out of state. We can prepare your federal tax return and any state returns that may be necessary. Important: Make sure you change your address with the IRS by submitting IRS Form 8822, available via irs.gov.

I am waiting on a K-1 from a business or trust that has its return prepared by someone else. Should I wait until I receive it before providing the rest of my documents to you? No, if you have everything else, please forward your information to us and include a note that you are waiting on a K-1.

How long does it take to prepare my taxes? We prepare tax returns on a first-in, first-out basis and time varies since every tax return is different. We do not begin the preparation of the tax return until all of your documents AND the completed Annual Questionnaire are received. Please understand that there is a high likelihood that an extension will be required if you submit your information to us within 30 days of the deadline. See **"What if I need to file an extension"** and **"How do extensions work?"** below.

I started a new business or rental activity this year. What do I need to provide?
Contact your tax preparer for a list of items needed.

How will I know when my tax preparer has questions, or when my return is ready? You will hear from your tax preparer during preparation. Once your tax return is ready, you will receive an email with instructions regarding reviewing your tax return, and the remaining steps to file your return. It is very important that we have your current email address to facilitate these communications. Make sure to add our domain @ChandlerKnowlesCPA.com to your Safe Senders list to ensure you receive all emails from our office.

How will I know when my tax return has been e-filed? You will receive an email when your return has been accepted by the IRS. Please be sure to add **efile@efileservices.net** to your Safe Senders list in order to receive this acceptance email.

How can I check on the status of my refund? After you receive the acceptance email, visit www.irs.gov.

When will my package be ready for pick-up? If you delivered hard copy documents to our office, your package will be ready for pickup 2-3 business days after you receive the e-mail confirmation that your return has been accepted. We will send you an email when it's ready!

What if I need to file an extension? If you are a currently engaged client, your tax return will automatically be extended if it has not been filed by the initial due date. See **"How do extensions work?"** below.

How do extensions work? An extension gives you more time to file your tax return, but not more time to pay your tax. If your return is filed after the April 18th deadline and you owe tax, and payment isn't made by April 18th with the extension, the IRS will assess late payment penalties. If you need our help with this calculation, submit your tax documents, completed Annual Organizer, and notes on any information you might still be waiting on as soon as possible.

Privacy Policy

Like all providers of personal financial services, tax professionals are required by law to inform clients of their policies regarding privacy of client information. Our firm continues to adhere to professional standards of confidentiality that are even more stringent than those required by law. We have always protected the security and privacy of your personal and financial information.

Types of Nonpublic Personal Information We Collect

The only nonpublic personal information we collect is provided to us by you or obtained with your authorization.

Parties to Whom We Disclose Information

We do not disclose any nonpublic personal information obtained in the course of our practice except as required or permitted by law. Permitted disclosures may include providing information to our employees, or, in limited situations, to unrelated third parties who need that information to assist us in serving you. In all situations, we stress the confidential nature of the information being shared.

Protecting the Confidentiality and Security of Clients' Information

We retain records relating to our professional services to better serve your professional needs and, in some cases, to comply with professional guidelines. In order to protect your nonpublic personal information, we maintain physical, electronic, and procedural safeguards that comply with our professional standards.

CHANDLER & KNOWLES
CPAs, PLLC

! Information Needed for Tax Preparation !

w Completed Annual Questionnaire.

Provide the following as applicable:

w Forms W-2 for wages, salaries and tips.

w Forms 1099 for interest, dividends, retirement, miscellaneous income, nonemployee compensation, Social Security, state or local refunds, gambling winnings, unemployment compensation, etc.

w Brokerage statements showing investment transactions for stocks, bonds, digital assets, etc.

w Schedule K-1 from Partnerships, S Corporations, Estates and Trusts.

w Statements supporting educational expenses, deductions or distributions, including any Forms 1098-T, 1098-E, or 1098-Q.

w Statements from U.S. Department of Education supporting federal student loan forgiveness.

w Forms 1095-A, 1095-B, and/or 1095-C related to health care coverage or the Premium Tax Credit.

w 1099-QA and/or 5498-QA related to ABLE (Achieving a Better Life Experience) account.

w Statements supporting deductions for mortgage interest (Forms 1098), taxes, and charitable contributions (including any Form 1098-C).

w Statements supporting the receipt, exchange, sale, use, or any other disposition of a digital asset.

w Copies of Closing Disclosures regarding the sale or purchase of real property.

w Legal documents for adoption, divorce, or separation involving custody of your dependent children.

w Copies of Dependent Care provider statements (i.e., child care).

w Six-digit Identity Protection PIN for use during calendar year 2022, if sent to you by the IRS.

w Any tax notices sent to you by the IRS or other taxing authority (if not provided previously).

w A copy of your tax return from last year (if not prepared by this office or provided previously).

K Continued.... K

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I **Friendly Reminders** $

4 The only receipts we review and scan are those specifically requested on the Annual Questionnaire.
Do not include any other receipts with your tax documents.

! If you have medical expenses, calculate and provide totals. Do not include receipts.

If you are providing Hard Copies of your Documents:

X Please remove all paper clips and staples from documents.

+ All envelopes must be opened - **do NOT include unopened envelopes**. We are not allowed to open mail on your behalf.

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~ **IMPORTANT** ~

The 2022 federal tax filing deadline for personal tax returns is April 18, 2023. If we have not received the information necessary to complete your tax return by **March 17, 2023**, we cannot ensure your return will be completed before the deadline.

**Reminders for Currently Engaged Clients:
If your personal tax return has not been filed by the April 18th deadline, our office will automatically file an extension on your behalf. **An extension gives you more time to file your tax return, but not more time to pay your tax**. If you owe when your tax return is filed and payment wasn't made with the extension by the April 18th deadline, the IRS will assess late payment penalties. If you need our help with this calculation, contact your tax preparer.

Refer to our Year End email (sent each December) for other important information. If you need another copy, contact our office.

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Chandler & Knowles CPAs
Annual Questionnaire

PREFERRED CONTACT NAME: ______________________________

BEST EMAIL ADDRESS: ______________________________

BEST PHONE NUMBER: ______________________________

Please check the appropriate box and include all necessary details and documentation.

	Yes	No
Personal Information		
Did your marital status change during the year?	p	p
If yes, explain: ______________________________		
Did you live separately from your spouse during the last six months of the year?	p	p

If you were newly married in 2022, provide the following **for your Spouse**:

Legal Name ______________________________

Social Security Number ____________________ Date of Birth ____________

	Yes	No
Did your address change from last year?	p	p

If yes, please provide current address:

____

Important: You must notify the IRS of your address change by submitting Form 8822. The form is available via irs.gov.

	Yes	No
Can you be claimed as a dependent by another taxpayer?	p	p
Did you change any bank accounts, or did routing transit numbers (RTN) and/or bank account numbers change for existing bank accounts that have been used to direct deposit (or direct debit) funds from (or to) the IRS or other taxing authority during the tax year?	p	p

If yes, note your new banking information on the tax organizer, or provide a copy of a canceled check. *Do not send your banking information via email. The most secure way to provide sensitive information is via the portal.*

	Yes	No
Did you receive an Identity Protection PIN (IP PIN) from the IRS or have you been a victim of identity theft?	p	p

If yes, include the IRS letter.

	Yes	No
Did you reside in or operate a business in a Federally declared disaster area?	p	p

The Federally declared disaster areas include victims of hurricanes, tropical storms, floods, as well as wildfires.

COVID-19 Information

	Yes	No
Did you receive State and Local Fiscal Recovery Funds (SLFR) under a program to support those negatively impacted by the COVID-19 pandemic for helping you with your mortgage insurance and/or home purchases, such as funds to pay some or all of the down payment and closing costs associated with your purchase of a home?	p	p
Are you a telecommuting employee that was required to "shelter in place" due to local COVID-19 protocols while working in a state that was not your home state?	p	p
Did you pay emergency sick leave wages to a household employee?	p	p

	Yes	No
Did you pay emergency family leave wages to a household employee?	p	p
Did you receive any special unemployment benefits or compensation under the Coronavirus Relief Act during the year?	p	p

Dependent Information

	Yes	No
Were there any changes in dependents from the prior year?	p	p
If yes, explain: ____		
Do you have any children under age 19 or a full-time student under age 24 with unearned income in excess of $2,300?	p	p
If you have dependents who must file a tax return, do you need our assistance?	p	p
Did you provide over half the support for any other person(s) other than your dependent children during the year?	p	p
Did you pay for child care while you worked, looked for work, or while a full-time student?	p	p
If yes, include copies of all Dependent Care (i.e., Child Care) provider statements.		
Is there any other person who lived with you more than half the year but not claimed by you last year?	p	p
Did you pay any expenses related to the adoption of a child during the year?	p	p
If you are divorced or separated with child(ren), do you have a divorce decree or other form of separation agreement which establishes custodial responsibilities?	p	p
Did any dependents receive an Identity Protection PIN (IP PIN) from the IRS or have they been a victim of identity theft?	p	p
If yes, include the IRS letter.		

Purchases, Sales, Business, and Debt Information

	Yes	No
Did you start a new business or purchase rental property during the year?	p	p
If yes, do not provide receipts, for either income or expenses, to our office. *C*ontact your tax preparer for a list of additional information required.		
Did you sell, exchange, or purchase any assets used in your trade or business?	p	p
Did you acquire a new or additional interest in a partnership or S corporation?	p	p
Did you sell, exchange, or purchase any real estate during the year?	p	p
If yes, include the Closing Disclosure.		
Did you purchase or sell a principal residence during the year?	p	p
If yes, include the Closing Disclosure.		
Did you foreclose or abandon a principal residence or real property during the year?	p	p
Did you acquire or dispose of any stock during the year?	p	p
Did you take out a home equity loan this year?	p	p
Did you refinance a principal residence or second home this year?	p	p
If yes, include the Closing Disclosure.		
Did you sell an existing business, rental, or other property this year?	p	p
Did you lend money personally with the understanding of repayment and this year it became totally uncollectable?	p	p
Did you have any debts canceled or forgiven this year, such as a home mortgage, student loan(s), credit card, or personal loan?	p	p
Did you purchase a qualified plug-in electric drive vehicle this year?	p	p
If yes, include the receipt.		

Income Information

	Yes	No
Did you have any foreign income during the year?	p	p
Did you have any interest or dividend income?	p	p
If yes, include Form(s) 1099.		

	Yes	No
Did you receive any income from property sold prior to this year? If yes, explain: ____	p	p
Did you receive any unemployment benefits during the year? If yes, include Form 1099-G.	p	p
Did you receive any disability income during the year?	p	p
Did you receive any Medicaid waiver payments as difficulty of care during the year?	p	p
Did you receive tip income not reported to your employer this year?	p	p
Did any of your life insurance policies mature, or did you surrender any policies?	p	p
Did you receive any awards, prizes, hobby income, gambling or lottery winnings?	p	p
Did you receive any income considered to be nonemployee compensation?	p	p
Did you receive Form 1099-K, 1099-MISC, 1099-NEC, or other income statement for work done in what is commonly referred to as the "gig" economy?	p	p
Do you expect a large fluctuation in income, deductions, or withholding next year?	p	p
At any time during 2022, did you receive, sell, exchange, or otherwise dispose of any financial interest in any digital asset (including from an airdrop or a hard fork), or did you use digital assets to pay for goods or services?	p	p

Retirement Information

	Yes	No
Are you an active participant in a pension or retirement plan?	p	p
Did you receive any Social Security benefits during the year? If yes, include Form SSA.	p	p
Did you make any withdrawals from an IRA, Roth, Keogh, SIMPLE, SEP, 401(k), or other qualified retirement plan? If yes, include Form(s) 1099-R.	p	p
If yes, were any withdrawals due to a Federally declared disaster?	p	p
If you received any qualified disaster retirement plan distributions, did you repay any of the distributions in 2022?	p	p
Did you receive any lump-sum payments from a pension, profit sharing or 401(k) plan? If yes, include Form(s) 1099-R.	p	p
Did you make any contributions to an IRA, Roth, Keogh, SIMPLE, SEP, 401(k), or other qualified retirement plan? If yes, include Form(s) 5498.	p	p
If you are self-employed, would you like help calculating allowable retirement plan contributions?	p	p

Education Information

	Yes	No
Did you, your spouse, or your dependents attend a post-secondary school during the year?	p	p
Did you have any educational expenses during the year on behalf of yourself, your spouse, or a dependent? If yes, include Form(s) 1098-T and receipts for qualified tuition and related expenses.	p	p
Did anyone in your family receive a scholarship of any kind during the year?	p	p
If yes, were any of the scholarship funds used for expenses other than tuition, such as room and board?	p	p
Did you make any withdrawals from an education savings or 529 Plan account? If yes, include Form(s) 1099-Q.	p	p
If yes, were any of these withdrawals rolled over into an ABLE (Achieving a Better Life Experience) account?	p	p
Did you pay any student loan interest this year? If yes, include Form(s) 1098-E.	p	p
Did you cash any Series EE or I U.S. Savings bonds issued after 1989?	p	p

	Yes	No
Health Care Information		
Did you have qualifying health care coverage, such as employer-sponsored coverage or government-sponsored coverage (i.e., Medicare/Medicaid) for your family?	p	p
"Your family" for health care coverage refers to you, your spouse if filing jointly, and anyone you can claim as a dependent.		
Did you enroll for lower cost Marketplace Coverage through healthcare.gov under the Affordable Care Act?	p	p
If yes, attach any Form(s) 1095-A you received.		
Did you enroll for lower cost Marketplace Coverage through healthcare.gov under the Affordable Care Act, and share a policy with anyone who is not included in your family?	p	p
Did you make any contributions to a Health savings account (HSA) or Archer MSA?	p	p
Note: an HSA is different from a flex spending account/cafeteria plan.		
If yes, include Form(s) 5498-SA.		
Did you receive any distributions from a Health savings account (HSA), Archer MSA, or Medicare Advantage MSA this year?	p	p
If yes, include Form 1099-SA.		
Did you pay long-term care premiums for yourself or your family?	p	p
Did you make any contributions to an ABLE (Achieving a Better Life Experience) account?	p	p
If yes, include Form(s) 5498-QA.		
Did you receive any withdrawals from an ABLE (Achieving a Better Life Experience) account?	p	p
If yes, include Form(s) 1099-QA.		
If you are a self-employed business owner, did you pay health insurance premiums for your employees this year?	p	p

Itemized Deduction Information

Did you incur a casualty or theft loss or any condemnation awards during the year?	p	p
If yes, did the loss occur in a Federally declared disaster area?	p	p
Did you pay out-of-pocket medical expenses (Co-pays, prescription drugs, etc.)?	p	p
If yes, calculate and provide the total by category. *Do not submit receipts to our office.*		
Did you make any cash or noncash charitable contributions (clothes, furniture, etc.)?	p	p
If yes, provide evidence such as a receipt from the donee organization, a canceled check, or record of payment, to substantiate all contributions made.		
Did you donate a vehicle or boat during the year?	p	p
If yes, include Form 1098-C or other documentation from the donee organization.		
Did you pay real estate taxes for your primary home and/or second home?	p	p
Did you pay any mortgage interest on an existing home loan?	p	p
If yes, include Form(s) 1098.		
Did you incur interest expenses associated with any investment accounts you held?	p	p
Did you make any major purchases during the year (cars, boats, etc.)?	p	p
If yes, include receipts.		

Miscellaneous Information

Did you make gifts of more than $16,000 to any individual?	p	p
Did you utilize an area of your home for business purposes?	p	p
Did you engage in any bartering transactions?	p	p
Did you retire or change jobs this year?	p	p
Did you incur moving costs because of a permanent change of station as a member of the Armed Forces on active duty?	p	p
Did you pay any individual as a household employee during the year?	p	p
Did you make energy efficient improvements to your main home this year?	p	p
If yes, include receipts.		

	Yes	No
Did you receive a distribution from, or were you a grantor or transferor for, a foreign trust?	p	p
Did you have a financial interest in or signature authority over any financial account such as a bank account, securities account, or brokerage account, **located in a foreign country?**	p	p
Did you have any foreign financial accounts, foreign financial assets, or hold interest in a foreign entity?	p	p
Did you receive correspondence from any State or the IRS that has not already been provided?	p	p
If yes, explain: ____		
Do you have previous years of tax returns that are either unfiled or filed with unpaid balances due?	p	p
Do you wish to designate $3 to the Presidential Election Campaign Fund?	p	p
If you check yes, it will not change your tax or reduce your refund.		
If you are due a refund, would you like to have it applied to next year's taxes?	p	p
If no, would you prefer to have it direct deposited into your bank account?	p	p
If you have tax due, would you prefer to have it automatically withdrawn from your bank account?	p	p
Did you make any 2022 estimated tax payments?	p	p

If yes, please provide the amount and date of each payment made.
For your reference, the due date for each 2022 estimated tax payment is provided below:

	Due Date	Amount Paid	Date Paid
Q1 ES:	04/18/2022	______________________	____________________
Q2 ES:	06/15/2022	______________________	____________________
Q3 ES:	09/15/2022	______________________	____________________
Q4 ES:	01/17/2023	______________________	____________________

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l Friendly Reminders $

4 The <u>only</u> receipts we review and scan are those specifically requested in this Annual Questionnaire. *Do not include any other receipts with your tax documents.*

! If you have medical expenses, calculate and provide totals - do not include receipts.

If you are providing Hard Copies of your Documents:

X Please remove all paper clips and staples from documents.

\+ All envelopes must be opened - **do NOT include unopened envelopes**.
We are not allowed to open mail on your behalf.

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~ IMPORTANT ~

The 2022 federal tax filing deadline for personal tax returns is April 18, 2023. If we have not received the information necessary to complete your tax return by **March 17, 2023**, we cannot ensure your return will be completed before the deadline.

**Reminders for Currently Engaged Clients:
If your personal tax return has not been filed by the April 18th deadline, our office will automatically file an extension on your behalf. **An extension gives you more time to file your tax return, *but not more time to pay your tax***. If you owe when your tax return is filed and payment wasn't made with the extension by the April 18th deadline, the IRS will assess late payment penalties. If you need our help with this calculation, contact your tax preparer.

Refer to our Year End email (sent each December) for other important information. If you need another copy, contact our office.

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Chandler and Knowles CPAs, PLLC
7370 Hawk Rd
Flower Mound, TX 75022
817-430-3000

Dear Client:

IRS regulations require paid tax preparers to perform a series of due diligence requirements for certain credits and/or filing statuses. **We believe you are/may be eligible for one or more of the credits or the filing status**. In order to comply with these requirements, we are required to obtain answers to the following due diligence questions and to obtain documentation where applicable. Please respond to the questions below by marking Y (yes) or N (no) where indicated.

Earned Income Credit - *Y or N*
Were you (taxpayer(s)) a US citizen or resident alien for all of 2022?____

Are dependent(s) claimed on your tax return your: son, daughter, stepchild, foster child, or a descendant of any of them (for example, your grandchild), or brother, sister, half-brother, half-sister, stepbrother, stepsister, or a descendant of any of them (for example, your niece or nephew)? ____

Did any dependent(s) file a joint return with another person for 2022? ____

Did dependent(s) live with you in the United States for more than half of 2022? ____
*You can't claim the EIC for a child who didn't live with you for more than half of the year, even if you paid most of the child's living expenses.

Do you believe dependent(s) could also meet the qualifications to be a qualifying child of another tax filer? ____
*Sometimes a child meets the tests to be a qualifying child of more than one person. However, only one of these persons can actually treat the child as a qualifying child. Only that person can use the child as a qualifying child.

Child Tax Credit - *Y or N*
Are dependent(s) claimed on your tax return your: son, daughter, stepchild, foster child, brother, sister, stepbrother, stepsister, half-brother, half-sister, or a descendant of any of them (for example, your grandchild, niece, or nephew)? ____

Did any dependent(s) provide over half of his or her own support for 2022? ____

Did all dependent(s) live with you for more than half of 2022? ____

Did any dependent(s) file a joint return with another person for 2022? ____

Are all dependent(s) a U.S. citizen, a U.S. national, or a U.S. resident alien? ____ If yes:

*We are required to obtain from the taxpayer a document proving the existence of the child such as one of the following, **which must have the child's name on it**:
- School record or statement
- Health care provider statement
- Child care provider record
- Place of worship statement

American Opportunity Tax Credit- *Y or N*
As of the beginning of 2022, has the student completed the first 4 years of postsecondary education (generally, the freshman through senior years of college), as determined by the eligible educational institution? ____

For the student, has either the American Opportunity Tax credit or the Hope Scholarship credit been claimed by you or anyone else for this student for any 4 tax years before 2022? ____
*If the American Opportunity Tax credit (and Hope Scholarship credit) has been claimed for this student for any 3 or fewer tax years before 2022, this requirement is met.

For at least one academic period beginning (or treated as beginning) in 2022, has the student met both of the following? ____
(a) Was enrolled in a program that leads to a degree, certificate, or other recognized educational credential; and
(b) Carried at least one-half the normal full-time workload for his or her course of study.

As of the end of 2022, has the student been convicted of a federal or state felony for possessing or distributing a controlled substance? ____

Head of Household Filing Status - *Y or N*
Are you, the taxpayer, unmarried on 12/31/22 *AND* do you provide more than half of the cost of keeping up a home for the year for a qualifying person? ____

General - *Y or N*
Can you provide documentation to substantiate the above answers? ____

Have you ever had any of these credits disallowed or reduced in the past? ____

Sincerely,

Chandler and Knowles CPAs, PLLC

Completed By: ____________________________________

Date: _______________________

General: 1040

Personal Information

Filing (Marital) status code (1 = Single, 2 = Married filing joint, 3 = Married filing separate, 4 = Head of household, 5 = Qualifying surviving spouse) ____

Mark if you were married but living apart all year ____ Mark if your nonresident alien spouse does not have an ITIN ____

	Taxpayer	Spouse
Social security number		
First name		
Last name		
Occupation		
Designate $3.00 to the presidential election campaign fund? (1 = Yes, 2 = No, 3=Blank)		
Mark if legally blind		
Mark if dependent of another taxpayer		
Taxpayer between 19 and 23, full-time student, with income less than 1/2 support? (Y, N)		
Date of birth		
Date of death		
Work/daytime telephone number/ext number		
Do you authorize us to discuss your return with the IRS (Y, N)		

General: 1040, Contact

Present Mailing Address

Address ____

Apartment number ____

City/State postal code/Zip code ____

Foreign country name ____

Foreign phone number ____

Home/evening telephone number ____

Taxpayer email address ____

Spouse email address ____

General: 1040

Dependent Information

First Name	Last Name	Date of Birth	Social Security No.	Relationship	Months in home	Care expenses paid for dependent

Credits: 2441

Child and Dependent Care Expenses

Provider information:

Business name ____

First and Last name ____

Street address ____

City, state, and zip code ____

Social security number OR Employer identification number ____

Tax Exempt or Living Abroad Foreign Care Provider (1 = TE, 2 = LAFCP) ____

Amount paid to care provider in 2022 ____

	Taxpayer	Spouse
Employer-provided dependent care benefits that were forfeited		

NOTES/QUESTIONS:

General: Bank

Direct Deposit/Electronic Funds Withdrawal Information

Per IRS Security Summit requirements, verify the name of financial institution, routing transit number, account number , and type of account below. If you would like to have a refund direct deposited into or a balance due debited from your bank account(s), please enter information in the fields below. Note that electronic funds will be withdrawn only from the primary account listed below.

Mark to verify all accounts listed below have been reviewed, updated as needed, and are correct. _

Primary account:

Financial institution routing transit number ____________

Name of financial institution ____________

Your account number ____________

Type of account (1 = Savings, 2 = Checking, 3 = IRA*) _

Mark if married filing jointly and this is a joint account (Both taxpayer and spouse names are on the account) _

Mark if financial institution is foreign based (Not located in the territorial jurisdiction of the United States) _

Enter the maximum dollar amount, or percentage of total refund Dollar ____________ **or** Percent (xxx.xx) ____________

Secondary account #1:

Financial institution routing transit number ____________

Name of financial institution ____________

Your account number ____________

Type of account (1 = Savings, 2 = Checking, 3 = IRA*) _

Mark if married filing jointly and this is a joint account (Both taxpayer and spouse names are on the account) _

Mark if financial institution is foreign based (Not located in the territorial jurisdiction of the United States) _

Enter the maximum dollar amount, or percentage of total refund Dollar ____________ **or** Percent (xxx.xx) ____________

Secondary account #2:

Financial institution routing transit number ____________

Name of financial institution ____________

Your account number ____________

Type of account (1 = Savings, 2 = Checking, 3 = IRA*) _

Mark if married filing jointly and this is a joint account (Both taxpayer and spouse names are on the account) _

Mark if financial institution is foreign based (Not located in the territorial jurisdiction of the United States) _

Enter the maximum dollar amount, or percentage of total refund Dollar ____________ **or** Percent (xxx.xx) ____________

*Refunds may only be direct deposited to established traditional, Roth or SEP-IRA accounts. Make sure direct deposits will be accepted by the bank or financial institution.

Electronic Filing: ID Auth

Identity Authentication

Taxpayer -

Form of identification (1 = Driver's license, 2 = State issued identification card, 3 = No applicable identification, 4 = Identification not provided) ___

Identification number ____________

Issue date ____________

Expiration date ____________

Location of issuance ___

Document number (New York only) ____________

Spouse -

Form of identification (1 = Driver's license, 2 = State issued identification card, 3 = No applicable identification, 4 = Identification not provided) ___

Identification number ____________

Issue date ____________

Expiration date ____________

Location of issuance ___

Document number (New York only) ____________

NOTES/QUESTIONS:

Income: W2

Salary and Wages

Please provide all copies of Form W-2 that you receive.
Below is a list of the Form(s) W-2 as reported in last year's tax return. If a particular W-2 no longer applies, mark the not applicable box.

T/S	Description	Prior Year Information	Mark if no longer applicable

Retirement: 1099R

Pension, IRA, and Annuity Distributions

Please provide all copies of Form 1099-R that you receive.
Below is a list of the Form(s) 1099-R as reported in last year's tax return. If a particular 1099-R no longer applies, mark the not applicable b

T/S	Description	Prior Year Information	Mark if no longer applicable

Income: K1, K1T

Schedules K-1

Please provide all copies of Schedule K-1 that you receive.
Below is a list of the Schedule(s) K-1 as reported in last year's tax return. If a particular K-1 no longer applies, mark the not applicable box

T/S/J	Description	Form	Mark if no longer applicable

Income: W2G

Gambling Income

Please provide all copies of Form W-2G that you receive.
Below is a list of the Form(s) W-2G as reported in last year's tax return. If a particular W-2G no longer applies, mark the not applicable box

T/S	Description	Prior Year Information	Mark if no longer applicable

Educate: 1099Q

Qualified Education Plan Distributions

Please provide all copies of Form 1099-Q that you receive.
Below is a list of the Form(s) 1099-Q as reported in last year's tax return. If a particular 1099-Q no longer applies, mark the not applicable b

T/S	Description	Prior Year Information	Mark if no longer applicable

NOTES/QUESTIONS:

Income: B1

Interest Income

Please provide all copies of Form 1099-INT or other statements reporting interest income.

T/S/J	Payer Name	Interest Income	Prior Year Information

Income: B3

Seller Financed Mortgage Interest

T, S, J ___ Payer's name ________ Payer's social security number ________

Payer's address, city, state, zip code ________ ________ ___ ________

Amount received in 2022 ________ Amount received in 2021 ________

Income: B2

Dividend Income

Please provide copies of all Form 1099-DIV or other statements reporting dividend income.

T/S/J	Payer Name	Ordinary Dividends	Qualified Dividends	Prior Year Information

Income: D

Sales of Stocks, Securities, and Other Investment Property

Please provide copies of all Forms 1099-B and 1099-S.

T/S/J	Description of Property	Date Acquired	Date Sold	Gross Sales Price (Less expenses of sale)	Cost or Other Basis

Income: Income

Other Income

Please provide copies of all supporting documentation.

	2022 Information	Prior Year Information
State and local income tax refunds		

	T/S	Agreement Date	2022 Information	Prior Year Information
Alimony received				

	Taxpayer	Spouse	Prior Year Information
Unemployment compensation			
Unemployment compensation repaid			
Social security benefits			
Medicare premiums to be reported on Schedule A			
Railroad retirement benefits			

T/S/J	Other Income:	2022 Information	Prior Year Information

1040 Adj: IRA

Adjustments to Income - IRA Contributions

Please provide year end statements for each account and any Form 8606 not prepared by this office.

	Taxpayer	Spouse
Traditional IRA Contributions for 2022 -		
If you want to contribute the maximum allowable traditional IRA contribution amount, enter the applicable code: (1 = Deductible only, 2 = Both deductible and nondeductible)	___	___
Enter the total traditional IRA contributions made for use in 2022	________	________
Roth IRA Contributions for 2022 -		
Mark if you want to contribute the maximum Roth IRA contribution	___	___
Enter the total Roth IRA contributions made for use in 2022	________	________

Educate: Educate2

Higher Education Deductions and/or Credits

Complete this section if you paid interest on a qualified student loan in 2022 for qualified higher education expenses for you, your spouse, or a person who was your dependent when you took out the loan.

T/S	Qualified student loan interest paid	2022 Information	Prior Year Information
___	________	________	________
___	________	________	________

Complete this section if you paid qualified education expenses for higher education costs in 2022.
Qualified education expenses include tuition and fees required for enrollment or attendance at an eligible educational institution.
Please provide all copies of Form 1098-T.

T/S	Ed Exp Code*	Student's SSN	Student's First Name	Student's Last Name	Qualified Expenses	Prior Year Information
___	_	________	________	________	________	________
___	_	________	________	________	________	________
___	_	________	________	________	________	________
___	_	________	________	________	________	________

***Education Expense Code: 1 = American opportunity credit; 2 = Lifetime learning credit; 3 = Tuition and fees deduction**
The student qualifies for the American opportunity credit when enrolled at least half-time in a program leading to a degree, certificate, or recognized credential; has not completed the first 4 years of post-secondary education; has no felony drug convictions on student's record.

1040 Adj: 3903

Job Related Moving Expenses

Complete this section if you moved to a new home due to service in the armed forces.

Description of move	________
Taxpayer/Spouse/Joint (T, S, J)	___
Mark if the move was due to service in the armed forces	_
Number of miles from old home to new workplace	________
Number of miles from old home to old workplace	________
Mark if move is outside United States or its possessions	_
Transportation and storage expenses	________
Travel and lodging (not including meals)	________
Total amount reimbursed for moving expenses	________

1040 Adj: OtherAdj

Other Adjustments to Income

Alimony Paid:

T/S	Date*	Recipient name	Recipient SSN	2022 Information	Prior Year Information
___	________	________		________	________

Street address ________

City, State and Zip code ________ ___ ________

*Enter the divorce/separation agreement date

	Taxpayer	Spouse	Prior Year Information
Educator expenses:			
________	________	________	________
________	________	________	________
Other adjustments:			
________	________	________	________
________	________	________	________
________	________	________	________

Itemized: A1

Medical and Dental Expenses

T/S/J		2022 Information	Prior Year Information
__	Medical and dental expenses		
__	Medical insurance premiums you paid***		
__	Long-term care premiums you paid***		
__	Prescription medicines and drugs		
__	Miles driven for medical items (1/1/22-6/30/22, 18 cents)		
__	Miles driven for medical items (7/1/22-12/31/22, 22 cents)		

***Do not include pre-tax amounts paid by an employer-sponsored plan, amounts paid for your self-employed business, or Medicare premiums entered on Form Lite-3

Itemized: A1

Tax Expenses

T/S/J		2022 Information	Prior Year Information
__	State/local income taxes paid		
__	2021 state and local income taxes paid in 2022		
__	Sales tax paid on actual expenses		
__	Real estate taxes paid		
__	Personal property taxes		
__	Other taxes		

Itemized: A2

Interest Expenses

T/S/J		2022 Information	Prior Year Information
__	Home mortgage interest From Form 1098		

Other home mortgage interest paid to individuals:

T/S/J	Payee's Name	SSN or EIN	2022 Information	Prior Year Information
__				

Address	City	State	Zip Code

T/S/J		2022 Information	Prior Year Information
__	Investment interest expense, other than on Sch K-1s:		

Refinancing Information:	Refinance #1	Refinance #2
T/S/J	__	__
Recipient/Lender name		
Total points paid at time of refinance		
Date of refinance		
Term of new loan (in months)		
Reported on Form 1098 in 2022		

Itemized: A3

Charitable Contributions

T/S/J		2022 Information	Prior Year Information
__	Contributions made by cash or check		
__	Volunteer miles driven		
__	Noncash items, such as: Goodwill, Salvation Army		

Itemized: A3, A-St

Miscellaneous Deductions

T/S/J		2022 Information	Prior Year Information
__	Other expenses ______________________		
__	Gambling losses (enter only if you have gambling income)		

*****STATE USE ONLY - Complete the following fields only if you file a state return in AL, AR, CA, HI, MN, NY or PA**

T/S/J		2022 Information	Prior Year Information
__	Unreimbursed expenses***		
__	Union dues, other than amounts reported on Form W-2***		
__	Tax preparation fees***		
	Other expenses, subject to 2% AGI limitation***:		
__	______________________		
__	______________________		
__	Safe deposit box rental***		
__	Investment expenses, other than on Schedule(s) K-1 or Form(s) 1099-DIV/INT***		