

CLIENT NAME: _____



For tax year 2022, please complete the following 4 pages, sign and return it to our office.

YES NO

PERSONAL INFORMATION

- ☐ ☐ 1) Did your marital status change during the year?
- ☐ ☐ 2) Did your address or email address change during the year? Please provide on page 1 of the organizer.
- ☐ ☐ 3) Could you be claimed as a dependent on another person's tax return in 2022?
- ☐ ☐ 4) Did your bank account change during the year? If yes, please provide updated info.
- ☐ ☐ 5) Have you been a victim of identity theft or identity fraud?
- ☐ ☐ 6) Do you have an IRS Identity Protection Personal Identification Number (IP PIN)? Please provide IRS Letter 2940C for 2022. (Your IP PIN is NOT the same as your ID.ME login information used to access your transcripts and payments/refund information.)

DEPENDENTS

- ☐ ☐ 7) Were there any changes in dependents? For a new dependent, please provide a copy of their social security card.
- ☐ ☐ 8) Were any of your unmarried children who might be claimed as dependents, 19 years of age or older at the end of 2022?
- ☐ ☐ 9) Did you have any children under age 19 or full-time students under age 24 at the end of 2022 with total **unearned** income in excess of \$1,150?
- ☐ ☐ 10) Did you pay for childcare in 2022 for your dependent child under age 13? Please provide statements including federal ID number and address of provider.

HEALTH CARE COVERAGE

- ☐ ☐ 11) Did you have health insurance coverage from the Washington Marketplace (Exchange)? If so, please provide **Form 1095-A**.
- ☐ ☐ 12) Did you contribute to or have distribution from a Health Savings Account (HSA)? Please provide Form 1099-SA.

INCOME

- ☐ ☐ 13) Did you receive or pay alimony or spousal support? (for divorce prior to 2019)
- ☐ ☐ 14) Did you receive any **unreported income** (Casual labor, Door Dash, Uber, Airbnb, etc.) or unreported tip income of \$20 or more?
- ☐ ☐ 15) Did you cash any Series EE U.S. savings bonds issued after 1989 and pay qualified higher education expenses for yourself, your spouse, or your dependents?
- ☐ ☐ 16) Did you receive any disability income?
- ☐ ☐ 17) Did you receive or were you eligible to receive any unemployment income?

- ☐ ☐ 18) Did you have any rental income? Please provide income & expense summaries along with all documentation.
- ☐ ☐ 19) Did you have any self-employed business income? Please provide income & expense summaries along with all documentation.
- ☐ ☐ 20) Did you have any foreign income or pay any foreign taxes?
- ☐ ☐ 21) Do 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, or other financial account? If so, please provide statements.
- ☐ ☐ 22) Do you own any assets or real estate in a foreign country? If so, please provide documentation.
- ☐ ☐ 23) Did you receive a distribution from, or were you the grantor of, or transferor to, a foreign trust? Please provide documentation.

PURCHASES, SALES AND DEBT

- ☐ ☐ 24) Did you start a business or farm, purchase rental or royalty property, or acquire an interest in a partnership, S corporation, trust, or REMIC?
- ☐ ☐ 25) Did you purchase or dispose of any business assets (furniture, equipment, vehicles, real estate, etc.), or convert any personal assets to business use?
- ☐ ☐ 26) Did you buy or sell any stocks, bonds, or other investment property (outside of your retirement accounts) in 2022?
- ☐ ☐ 27) Did you purchase, sell, or refinance your principal home or second home, or did you take out a home equity loan? If so, please provide all settlement statements and documentation of proceeds.
- ☐ ☐ 28) Did you make any residential energy-efficient improvements? If so, please provide detailed information.
- ☐ ☐ 29) Did you purchase a new hybrid, alternative motor, or electric vehicle? If so, please provide invoice.
- ☐ ☐ 30) Did you have any debts forgiven or cancelled?
- ☐ ☐ 31) At any time in 2022, did you own a digital asset (such as Bitcoin)?
- ☐ ☐ 32) At any time in 2022, did you receive, sell, send, exchange or otherwise dispose of any financial interest in a digital asset? Please provide detailed statements and reports from all of your digital wallets.

RETIREMENT PLAN

- ☐ ☐ 33) Did you receive a distribution from a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.)? Please provide Form 1099-R.
- ☐ ☐ 34) Did you make a contribution to a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.) **outside** of a payroll deduction?
- ☐ ☐ 35) Did you rollover any retirement plan to another plan or IRA?

YES NO



- ☐ ☐ 36) Did you convert part or all of your traditional, SEP, or SIMPLE IRA to a ROTH IRA?
- ☐ ☐ 37) Did you make a ROTH IRA contribution for 2022?
- ☐ ☐ 38) Did you make any charitable contributions **directly** from your IRA accounts? Please provide all statements and documentation.
- ☐ ☐ 39) Will you be turning 72 in 2023?

EDUCATION

- ☐ ☐ 40) Did you receive a distribution from an Education Savings Account or a Qualified Tuition Program? If so, please provide details and Form 1099-Q.
- ☐ ☐ 41) Did you, your spouse, or a dependent incur any tuition or education expenses that are required to attend a college, university, or vocational school? If so, please provide Form 1098-T and an account summary from the educational institution.
- ☐ ☐ 42) Did you have a student loan that you paid interest on in 2022?
- ☐ ☐ 43) If you are an educator, did you have unreimbursed work expenses including books, equipment, classroom supplies, etc.? Please provide details.

ITEMIZED DEDUCTIONS

- ☐ ☐ 44) Did you pay mortgage interest and real estate taxes on a personal residence? If so, please provide Form 1098.
- ☐ ☐ 45) Did you pay sales tax on home improvements, or on the purchase of a car, motor home, boat, or other major item? Please provide documentation.
- ☐ ☐ 46) Did you have excessive out of pocket medical expenses / health insurance premiums (paid more than 7.5% of your income)?
- ☐ ☐ 47) Did you have charitable contributions for 2022? If so, **provide all supporting statements** and **all** documentation.

ESTIMATED TAXES

- ☐ ☐ 48) Did you make any estimated tax payments for 2022? If so, please provide documentation with amounts and dates.
- ☐ ☐ 49) Did you apply an overpayment of 2021 taxes to your 2022 estimated tax?
- ☐ ☐ 50) If you have an overpayment of 2022 taxes, do you want the excess applied to your 2023 estimated tax (instead of being refunded)?
- ☐ ☐ 51) Do you want to have your estimated tax payments automatically deducted?
- ☐ ☐ 52) If tax is owed for 2022, do you want the amount automatically withdrawn from your bank account on the due date?

MISCELLANEOUS

- ☐ ☐ 53) If self-employed, did you receive any COVID PPP forgiveness in 2022?
- ☐ ☐ 54) If self-employed, did you receive the Employee Retention Credit in 2022?

YES NO



- ☐ ☐ 55) Do you have business mileage for 2022? If so, please provide separate totals for January – June 2022 and July – December 2022.
- ☐ ☐ 56) Was your home rented out or used for business?
- ☐ ☐ 57) Did you or your spouse make any gifts to an individual or trust that total more than \$16,000?
- ☐ ☐ 58) Did you engage the services of any household employees that you paid over \$1000 per quarter or \$2300 for the year?
- ☐ ☐ 59) Were you notified or audited by the Internal Revenue Service? If you received any IRS correspondence, please provide copies.
- ☐ ☐ 60) May the IRS discuss your tax return with your preparer?
- ☐ ☐ 61) Do you want to allocate \$3 to the Presidential Election Campaign Fund?
- ☐ ☐ 62) Does your spouse want to allocate \$3 to the Presidential Election Campaign Fund?
- ☐ ☐ 63) Do you want to receive your tax organizer electronically in the future?
- ☐ ☐ 64) Do you want to receive your 2022 tax return copy electronically?
- ☐ ☐ 65) Did you complete page 1 of the organizer for any changes or updates?

Please sign and date below:

| | | | |
|----------|------|-------------------|------|
| | | | |
| Taxpayer | Date | Taxpayer (spouse) | Date |

Any relevant notes or additional information:
