



2022 Taxpayer Information

Please complete all Applicable Sections

Taxpayer

Last Name..... _____
 First Name..... _____
 SS Number..... _____
 Occupation..... _____
 Date of Birth.... _____
 Email Address.. _____
 Phone Number _____

Spouse

Last Name..... _____
 First Name..... _____
 SS Number..... _____
 Occupation..... _____
 Date of Birth.... _____
 Email Address.. _____
 Phone Number _____

Best Contact Number:

Mailing Address: _____

City/Village/Township of: _____ Zip Code: _____

Filing Status: _____

Dependents you have the legal right to claim in 2022:

<u>Name</u>	<u>Date of Birth</u>	<u>Social Sec. #</u>	<u>Relationship</u>	<u>Months lived with you in 2022</u>
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

➤ General:

YES NO

- Did you receive any unemployment compensation in 2022? (1099-G required)
- At any time during 2022, did you receive, sell, exchange, gift or otherwise dispose of a digital asset? (virtual currency/cryptocurrency)
- Is your health insurance from the marketplace exchange? (Form 1095-A required)
- Did you pay any supplemental health insurance? \$ enter amount
- Did anyone receive an **Identity Protection PIN** from the IRS? (provide IRS letter)
- Did you have dependent care expenses in 2022? (Daycare)
 - If yes, please provide name, address, EIN or SS# and amount paid.
- Did you receive/pay alimony in 2022?
 - If yes, what is the name and Social Security Number of the person whom you received from/paid?
Name: Enter full name **Soc. Sec.:** Enter SS Number **Amount:** Enter amount

- | | | |
|---|--------------------------|--------------------------|
| | YES | NO |
| ○ Did you have large out-of-pocket medical expenses in 2022? (<i>Provide figures</i>) | <input type="checkbox"/> | <input type="checkbox"/> |
| ○ Did you pay any real estate taxes in 2022? (for any year) (<i>provide tax bills/receipts</i>) | <input type="checkbox"/> | <input type="checkbox"/> |
| ○ Did you make any cash or non-cash charitable contributions? | <input type="checkbox"/> | <input type="checkbox"/> |
| ▪ <i>Only claim contributions that can be substantiated with receipts</i> | | |
| ○ Did you make any charitable contributions directly from a retirement account? (<i>QCD</i>) | <input type="checkbox"/> | <input type="checkbox"/> |
| ▪ If so please provide amount. \$ <u>Enter amount</u> | | |

➤ **Education:**

- | | | |
|--|--------------------------|--------------------------|
| ○ Did you have any educational expenses during the year on behalf of yourself, your spouse, or a dependent? If yes, attach any Form(s) 1098-T and receipts for qualified tuition and related expenses | <input type="checkbox"/> | <input type="checkbox"/> |
| ○ Did you make any withdrawals from an education savings or 529 Plan account? (<i>1099-Q</i>) | <input type="checkbox"/> | <input type="checkbox"/> |
| ○ Did you make any contributions to an education savings or 529 Plan account? | <input type="checkbox"/> | <input type="checkbox"/> |
| ▪ If yes, please provide us with the amounts. | | |
| ○ Did you pay any student loan interest in 2022? (<i>provide 1098-E from lender</i>) | <input type="checkbox"/> | <input type="checkbox"/> |

➤ **State:**

- | | | |
|---|--------------------------|--------------------------|
| ○ Did you pay any rent for living quarters in 2022? | <input type="checkbox"/> | <input type="checkbox"/> |
| ▪ If yes, please provide total: \$ <u>Enter amount paid</u> | | |
| ▪ Was heat included in your rent? | <input type="checkbox"/> | <input type="checkbox"/> |
| ○ Did you make any purchases (by telephone, internet, mail, or in person) which the seller did not collect sales tax? | <input type="checkbox"/> | <input type="checkbox"/> |
| ▪ If yes, provide total of purchases: \$ <u>Enter amount</u> x 5%= _____ (<i>we will do calculation</i>) | | |

➤ **Taxes & Direct Deposit:**

- | | | |
|---|--------------------------|--------------------------|
| ○ Did you pay Estimated Tax Payments ? | <input type="checkbox"/> | <input type="checkbox"/> |
| ○ If yes, amounts paid, and dates of payments are required. | | |
| ○ Do you have any foreign bank accounts? | <input type="checkbox"/> | <input type="checkbox"/> |
| ○ Do you want your refund directly deposited? | <input type="checkbox"/> | <input type="checkbox"/> |
| ○ Do you want to pay your tax balance due electronically? | <input type="checkbox"/> | <input type="checkbox"/> |

If you answered yes to either receiving your refund or paying amount due electronically, please provide voided check or fill out information below.

Routing Number	Account Number	Name of Bank	Checking or Savings	Date of Payment (if applicable)