**2022 Tax Preparation Checklist**

**General Taxable Income**
\_\_\_ Alimony Received (pre 2019 settlement)
\_\_\_ Dividend Income Statements: Form 1099-DIV
\_\_\_ Interest Income Statements: Form 1099-INT & 1099-OID
\_\_\_ Miscellaneous Income: Form 1099-MISC
\_\_\_ Sales of Real Estate: Form 1099-S
\_\_\_ Sales of Stock, Land, etc.: Form 1099-B
\_\_\_ State Tax Refunds
\_\_\_ Unemployment Compensation Received 1099G

\_\_\_ IRA And 401 K, Retirement Plan Withdrawals
\_\_\_ W-2 Form(s) for Wages, Salaries, and Tips

\_\_\_ Business / Farm / Hobby Income

**Retirement Income**\_\_\_ Railroad Retirement & Social Security Income: Form SSA-1099
\_\_\_ Retirement Income: Form 1099-R

**Business Income**

\_\_\_ Business Income and Expenses (Organizer is available)

\_\_\_ 1099forms – 1099 NEC and 1099 K, 1099 MISC
\_\_\_ Farm Income and Expenses (Organizer is available)
\_\_\_ Form K-1 Income from Partnerships, Trusts, and S-Corporations
\_\_\_ Rental Income and Expenses
\_\_\_ Tax Deductible Miles Traveled for Business Purposes (Mileage Log)

**Tax Credits Checklist**
\_\_\_ Adoption Expense Information
\_\_\_ Child Care Provider Address, I.D. Number and Amounts Paid
\_\_\_ Foreign Taxes paid

**Expense and Tax Deduction Checklist *– Used When Itemizing Only used when itemizing – must be over $12,950(Twelve Thousand, nine hundred fifty) for individual, $25900 (Twenty-five, thousand nine hundred) for married filing jointly. Head of household over $19,400****.* ***(Over 65 deduction is increased by $1750.)***\_\_\_ Charitable Cash Contributions -
\_\_\_ Doctor and Dentist Payments
\_\_\_ Fair Market Value of Non-cash Contributions to Charities
\_\_\_ Home Mortgage Interest from Form 1098
\_\_\_ Home Second Mortgage Interest Paid
\_\_\_ Hospital and Nurse Payments
\_\_\_ Charitable Cash Contributions
\_\_\_ Medical Expenses for the Family
\_\_\_ Medical Insurance Paid
\_\_\_ Miles Traveled for Volunteer Purposes
\_\_\_ Miles Traveled for Medical Purposes
\_\_\_ Miles Traveled Related to Charity Work
\_\_\_ Personal Property Taxes Paid
\_\_\_ Prescription Medicines and Drugs
\_\_\_ Real Estate Taxes Paid
\_\_\_ State Taxes Paid with Last Year's Return (if itemized)
\_\_\_ Student Loan Interest Paid \* *Can be used if not itemizing – always bring this!*
\_\_\_ Unreimbursed Expenses Related to Volunteer Work
\_\_\_ License Plate fees -
***Only used when itemizing – must be over $12,950(Twelve Thousand, nine hundred fifty) for individual, $25,900 (Twenty five Thousand, nine hundred) for married filing jointly. Head of household over $19,400****.* ***(Over 65 deduction is increased by $1750.00)*****Tax Estimate Payments Checklist**
\_\_\_ Estimated Tax Payments Made with ES Vouchers
\_\_\_ Last Year's Tax Return Overpayment Applied to This Year
\_\_\_ Off Highway Fuel Taxes Paid

**General Information**

\_\_\_ Last year’s tax return if available (new customers only)

\_\_\_ Identification Driver’s License or State issued ID
\_\_\_ Child Care Expenses for Each Dependent
\_\_\_ Dependents' Names, Dates of Birth, and Social Security Numbers
\_\_\_ Educational Expenses for You and Your Spouse / Dependents\_\_\_ IRS Pin – If issued for Identity Theft
\_\_\_ Social Security Numbers for You and Your Spouse and Dependents

\_\_\_ Rent Receipts, Property Tax Payments and Heating

\_\_\_ email address (must have to set up portal)

**Foreign Accounts and Trusts, crypto currency:**

\_\_\_ Any financial interest in foreign banks, securities

 brokerage funds etc.

 \_\_\_\_Distributions from, grantor or transferor to foreign trust

 \_\_\_\_\_Any purchase, sale, gift or receipt of any cryptocurrency

**Adjustments to Income (these can generally be taken without itemizing)**

\_\_\_\_\_\_ Educator (teacher expense)

\_\_\_\_\_\_ Ira Deduction

\_\_\_\_\_\_ Student Loan Interest

\_\_\_\_\_\_ Health Savings Account

\_\_\_\_\_\_ Alimony Paid (Pre- 2019 Divorce Declarations)

\_\_\_\_\_\_ Alternative energy property – Solar, Wind, Geothermal

\_\_\_\_\_\_ Education expenses – include 1098T, Course materials and books

\_\_\_\_\_\_ Self Employed Health Insurance

\_\_\_\_\_\_ Self Employed Retirement

**Additional Items to Bring:**

\_\_\_\_\_\_ Name, Correct spelling, Social Security Number of all Dependents,

Please list number of months in your home, Student Status, and any income received

\_\_\_\_\_\_ If you sold a home, please bring all closing paperwork with you including (1099 S)

\_\_\_\_\_\_ Name, Routing Number and Account Number of Financial institution

 For direct deposit