

Office Use Only:
IN _____
DE _____
W2 Summary _____
1099R Summary _____

2022 Tax Return Drop Off Information Sheet

WOULD YOU LIKE A CALL TO DISCUSS ANYTHING IN MORE DETAIL? Y / N
Ph. (Home): _____ Ph (Cell): _____ Date: _____

Name: _____

Spouse: _____

Any changes in address, occupation, marital status, or dependents? Y / N

New Address: _____

Date Moved: _____ New Marital Status: _____

New Occupation: TP _____ SP _____

Circle: New Dependent or Dependent no longer on your tax return

Name: _____ SSN _____ BD _____

IF YOU HAVE A REFUND, DO YOU WANT DIRECT DEPOSIT: Y / N
Same banking as last year? Y / N Checking _____ Savings _____

ATTACH VOIDED CHECK OR COPY OF SAVINGS CARD

If not available, please enter info below

Bank: _____ RTN _____ Acct # _____

DO YOU HAVE ANY EMPLOYEE BUSINESS EXPENSES? Y / N

List amount and what item it applies to and if it is for TP or Spouse: **Union dues, uniforms, tools, supplies, protective clothing, mileage, required cellphone expense, internet, etc.**

In addition to cost of uniforms do you want to deduct \$400 for washing them? Y / N

Have you included all sources of income? for example, wages, unemployment, self-employment, social security, gambling, interest, dividends, investment sales, distributions from pensions, IRAs, annuities, rent, Form 1099-K, miscellaneous income, etc. Y / N

Education expenses for you or your dependent? (must include Form 1098-T) Y / N
Books and supplies \$ _____

Student loan interest? Y / N \$ _____ or include Form 1098-E

Daycare expenses for dependent? (include provider statement) Y / N

Do you have any qualified home improvements for the energy credit? Examples are windows, doors, insulation, certain metal and asphalt roofs, heat pumps, furnaces and boilers, hot water heaters, central air, biomass stoves, solar or geothermal systems. List item and amount.

Was your health insurance obtained through Pennie.com? Y / N

If yes, then we need Form 1095-A to complete your tax return.

Do you have any bank accounts or investments held directly in a foreign country?

Y / N Value \$ _____

Alimony paid or received, only if court ordered before 2019 \$ _____

At any time during 2022, did you: (a) receive as a reward, award or payment for property or services; or (b) sell, exchange, gift, or otherwise dispose of a **digital asset** (or a financial interest in a **digital asset**)? e.g., **Bitcoin, Ethereum, NFTs** Y / N

If you make Quarterly estimates list the amounts and dates paid.

Traditional Ira or Roth IRA contributions for 2022 (not what you do at work)?

TP \$ _____ Spouse \$ _____ Traditional or Roth?

529 Plan contributions for 2022? List contributor, child, and amount.

Do you want us to do your Property Tax Rebate if you qualify? Y / N

Please include paid receipts for March and July of 2022

Do you owe any unpaid sales tax for internet purchases? Y / N

If yes, total of untaxed purchases requiring sales tax. \$ _____

