Wilson, Myers and Dold, CPAs
564 Auburn Ravine Rd
Auburn, CA 95603
530-885-6252

PREFERRED CONTACT NAME:

____

BEST EMAIL ADDRESS:

____

BEST PHONE NUMBER FOR CALLS:

____

BEST PHONE NUMBER FOR TEXTS:

____

IRS 2022 Identity Protection PIN (IP PIN)

Did you receive an IRS IP PIN in the mail? If so, please place an "x" next to the person(s) who received one and please provide a copy of the IRS letter(s). ____ Taxpayer ____ Spouse

Bank Account Information

Would you like to use direct deposit for any refunds? If yes, please answer below.

____ My bank account is the same as last year. I confirm the last four digits of the account to be used are: __ __ __ __

____ My bank account has changed. I will provide a voided check.

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

The Tax Organizer worksheets are provided as a tool, and completion is not mandatory. As long as we have all your important tax forms (see list below), we can prepare your return.

You will need to provide the following information, as applicable:

- Forms W-2 for wages, salaries and tips.
- All Forms 1099 for interest, dividends, retirement, miscellaneous income, Social Security, state or local refunds, gambling winnings, unemployment, etc.
- Brokerage statements showing investment transactions for stocks, bonds, etc.
- Schedule K-1 from partnerships, S corporations, estates and trusts.
- Statements supporting educational expenses, deductions or distributions, including any Forms 1098-T, 1098-E, or 1099-Q.
- Form 1095-A and FTB 3895 related to the Premium Tax Credit.
- Statements supporting deductions for mortgage interest, taxes, and charitable contributions (including any Form 1098-C).
- Form(s) 5498-SA and/or 1099-SA for any Health Savings Account (HSA) Contributions and/or Distributions.
- Copies of closing statements regarding the sale or purchase of real property.
- Information regarding any federal or state estimated tax payments made.
- Legal documents for adoption, divorce, or separation involving custody of your dependent children.
- Any tax notices sent to you by the IRS or other taxing authority (if not submitted previously).
- A copy of your income tax return from last year, if not prepared by this office.

Individual Income Tax Preparation Engagement Letter

We appreciate the opportunity to work with you. To minimize the possibility of a misunderstanding between us, we are setting forth pertinent information about the services we will perform for you.

We will prepare your 2022 federal and state individual income tax returns from information you furnish us. We will not audit or otherwise verify the data you submit, although we may ask you to clarify some of the information. We are furnishing you with questionnaires to help you gather and organize the necessary information for us, in order to keep our fee to a minimum.

Appointments: Appointments can be completed by zoom, phone, or in person this tax season. If you would like to make an appointment please call our office as soon as possible to schedule.
Tax appointments will be scheduled 30 minutes apart. Please schedule your appointment for no later than Friday, March 3, 2023. However, you do not need to make an appointment. You may drop off your information and we will notify you if we have questions or are missing information.

Deadlines: We are asking that we receive your tax documents and information to prepare your return by Friday, March 3, 2023, to ensure that your return will be completed by April 18, 2023.
We realize that you may not have received some of your tax documents (broker statements, K1s, etc.) by this date but we request that you send us your completed organizer and other information as soon as possible, with the expected delivery date of your missing items.

Electronic Signatures: You may now electronically sign your tax returns via email. A separate email will be needed for each person signing the return. If interested, please contact our office.

Electronic Filing: Taxing authorities require us to electronically file all federal and state individual income tax returns. However, you do have the right to "opt out" of the e-filing program. Please notify our firm *prior to your return preparation* should you desire not to have your return e-filed.

Additionally, please note that all tax payment due dates remain the same even if your return is e-filed. You must ensure that your payment of any tax balance due is timely remitted on or before April 18, 2023. Finally, please note that although our firm will use our best efforts to ensure that your returns are successfully transmitted to the appropriate taxing authorities, we will not be financially responsible for electronic transmission or other errors arising after your return has been successfully submitted from our office.

Fees: Fees for our services will be at our standard rates. Payment for service is due when rendered and interim billings may be submitted as work progresses and expenses are incurred.

In the past, we were occasionally able to offer tax preparation for some of our clients' children. With the rising costs associated with tax preparation and filing, we must now charge a minimum fee for each child's individual tax return.

<u>Other Services:</u> Our fee does not include responding to inquires or examination by taxing authorities. However, we are available to represent you and our fees are billed at our standard rates and may be covered under a separate engagement letter.

<u>Documentation and Record Retention Policy:</u> It is your responsibility to maintain, in your records, the documentation necessary to support the data used in preparing your tax returns, including but not limited to the auto, travel, entertainment, and related expenses and the required documents to support charitable contributions. If you have any questions as to the type of records required, please ask us for advice in that regard. It is also your responsibility to carefully examine and approve your completed tax returns before signing and filing with the tax authorities. We are not responsible for the disallowance of doubtful deductions or inadequately supported documentation, nor for resulting taxes, penalties and interest. It is our firm's policy to retain copies of your tax returns for 7 years, after which they will be destroyed. However, Wilson, Myers & Dold does not keep any original client records, so we will return those to you at the completion of the services rendered under this engagement. When records are returned to you, it is your responsibility to retain and protect your records for possible future use, including potential examination by any government or regulatory agencies.

We will use our judgment to resolve questions in your favor where a tax law is unclear if there is a reasonable justification for doing so. Whenever we are aware that a possibly applicable tax law is unclear or that there are conflicting interpretations of the law by authorities (e.g., tax agencies and courts), we will explain the possible positions that may be taken on your return. In accordance with our professional standards, we will follow whatever position you request, so long as it is consistent with the codes and regulations and interpretations that have been promulgated. If the IRS should later contest the position taken, there may be an assessment of additional tax plus interest and penalties. We assume no liability for any such additional penalties or assessments. In the event, however, that you ask us to take a tax position that in our professional judgment will not meet the applicable laws and standards as promulgated, we reserve the right to stop work and shall not be liable to you for any damages that occur as a result of ceasing to render services.

We are pleased to have you as a client and look forward to a long and mutually satisfying relationship.

Wilson, Myers & Dold
A Professional Corporation

Questions

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

	Yes	No
Personal Information		
Did your marital status change during the year?	☐	☐
Did your address change from last year?	☐	☐
Can you be claimed as a dependent by another taxpayer?	☐	☐
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 funds from the IRS or other taxing authority during the tax year?	☐	☐
Did you receive an Identity Protection PIN (IP PIN) from the IRS or have you been a victim of identity theft? If yes, attach the IRS letter.	☐	☐
Did you reside in or operate a business in a Federally declared disaster area? The Federally declared disaster areas include victims of hurricanes, tropical storms, floods, as well as wildfires.	☐	☐
Dependent Information		
Were there any changes in dependents from the prior year?	☐	☐
Do you have any children under age 19 or a full-time student under age 24 with unearned income in excess of $2,300?	☐	☐
Did you provide over half the support for any other person(s) other than your dependent children during the year?	☐	☐
Did you pay for child care while you worked or looked for work?	☐	☐
Did you pay any expenses related to the adoption of a child during the year?	☐	☐
Did any dependents receive an Identity Protection PIN (IP PIN) from the IRS or have they been a victim of identity theft? If yes, attach the IRS letter.	☐	☐
Purchases, Sales and Debt Information		
Did you start a new business or purchase rental property during the year?	☐	☐
Did you sell, exchange, or purchase any assets used in your trade or business?	☐	☐
Did you acquire a new or additional interest in a partnership or S corporation?	☐	☐
Did you sell, exchange, or purchase any real estate during the year?	☐	☐
Did you purchase, sell, or refinance a principal residence or second home,		

or did you take out a home equity loan during the year? ☐ ☐

Did you foreclose or abandon a principal residence or real property during the year? ☐ ☐

Did you acquire or dispose of any stock during the year? ☐ ☐

Did you sell an existing business, rental, or other property this year? ☐ ☐

Did you lend money with the understanding of repayment and this year it became totally uncollectable? ☐ ☐

Did you have any debts canceled or forgiven this year, such as a home mortgage or student loan(s)? ☐ ☐

Did you purchase a qualified plug-in electric drive vehicle this year? ☐ ☐

Income Information

Did you have any foreign income or pay any foreign taxes during the year? ☐ ☐

Did you receive any income from property sold prior to this year? ☐ ☐

Did you receive any unemployment benefits during the year? ☐ ☐

Did you receive any disability income during the year? ☐ ☐

Did you receive any Medicaid waiver payments as difficulty of care during the year? ☐ ☐

Did you receive tip income not reported to your employer this year? ☐ ☐

Did any of your life insurance policies mature, or did you surrender any policies? ☐ ☐

Did you receive any awards, prizes, hobby income, gambling or lottery winnings? ☐ ☐

Did you receive any income considered to be nonemployee compensation? ☐ ☐

Do you expect a large fluctuation in income, deductions, or withholding next year? ☐ ☐

Did you have any sales or other exchanges of digital assets (including from an airdrop or a hard fork), or used digital assets to pay for goods or services? ☐ ☐

Retirement Information

Are you an active participant in a pension or retirement plan? ☐ ☐

Did you receive any Social Security benefits during the year? ☐ ☐

Did you make any withdrawals from an IRA, Roth, Keogh, SIMPLE, SEP, 401(k), or other qualified retirement plan? ☐ ☐

If yes, were any withdrawals due to a Federally declared disaster? ☐ ☐

If you received any qualified disaster retirement plan distributions, did you repay any of the distributions in 2022?

Did you receive any lump-sum payments from a pension, profit sharing or 401(k) plan?

Did you make any contributions to an IRA, Roth, Keogh, SIMPLE, SEP, 401(k), or other qualified retirement plan?

Education Information

Did you, your spouse, or your dependents attend a post-secondary school during the year, or plan to attend one in the coming year?

Did you have any educational expenses during the year on behalf of yourself, your spouse, or a dependent?

Did anyone in your family receive a scholarship of any kind during the year?

If yes, were any of the scholarship funds used for expenses other than tuition, such as room and board?

Did you make any withdrawals from an education savings or 529 Plan account?

If yes, were any of these withdrawals rolled over into an ABLE (Achieving a Better Life Experience) account?

Did you pay any student loan interest this year?

Did you cash any Series EE or I U.S. Savings bonds issued after 1989?

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 for the full-year? "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? 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?

Did you make any contributions to a Health savings account (HSA) or Archer MSA?

Did you receive any distributions from a Health savings account (HSA), Archer MSA or Medicare Advantage MSA this year?

Did you pay long-term care premiums for yourself or your family?

Did you make any contributions to an ABLE (Achieving a Better Life

Experience) account? ☐ ☐

Did you receive any withdrawals from an ABLE (Achieving a Better Life Experience) account? ☐ ☐

If you are a business owner, did you pay health insurance premiums for your employees this year? ☐ ☐

Itemized Deduction Information

Did you incur a casualty or theft loss or any condemnation awards during the year? ☐ ☐

If yes, did the loss occur in a Federally declared disaster area? ☐ ☐

Did you pay any out-of-pocket medical expenses (Co-pays, prescription drugs, etc.)? ☐ ☐

Did you make any cash or noncash charitable contributions? ☐ ☐

Did you donate a vehicle or boat during the year? If yes, attach Form 1098-C or other written acknowledgment from the donee organization. ☐ ☐

Did you pay real estate taxes for your primary home and/or second home? ☐ ☐

Did you pay any mortgage interest on an existing home loan? If yes, attach any Form(s) 1098 you received. ☐ ☐

Did you incur interest expenses associated with any investment accounts you held? ☐ ☐

Did you make any major purchases during the year (cars, boats, etc)? ☐ ☐

Did you make any out-of-state purchases (by telephone, internet, mail, or in person) for which the seller did not collect state sales or use tax? ☐ ☐

Miscellaneous Information

Did you make gifts of more than $16,000 to any individual? ☐ ☐

Did you utilize an area of your home for business purposes? ☐ ☐

Did you incur moving costs because of a permanent change of station as a member of the Armed Forces on active duty? ☐ ☐

Did you pay any individual as a household employee during the year? ☐ ☐

Did you make energy efficient improvements to your main home this year? ☐ ☐

Did you receive a distribution from, or were you a grantor or transferor for a foreign trust? ☐ ☐

Did you have a financial interest in or signature authority over a financial account such as a bank account, securities account, or brokerage account, located in a foreign country? ☐ ☐

Do you have any foreign financial accounts, foreign financial assets, or hold interest in a foreign entity? ☐ ☐

Did you receive correspondence from the State or the IRS? ☐ ☐

May the IRS discuss your tax return with your preparer? ☐ ☐

Do you want to designate $3 to the Presidential Election Campaign Fund?
If you check yes, it will not change your tax or reduce your refund. ☐ ☐

Personal Information

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

Mark if you were married but living apart all year ____[2]

Mark if your nonresident alien spouse does not have an Individual Taxpayer Identification Number (ITIN) ____[3]

	Taxpayer	Spouse
Social security number	____[4]	____[5]
First name	____[6]	____[7]
Last name	____[8]	____[9]
Occupation	____[10]	____[11]
Designate $3.00 to the presidential election campaign fund? (1 = Yes, 2 = No, 3 = Blank)	____[12]	____[14]
Mark if dependent of another taxpayer	____[15]	____[16]
Taxpayer with income less than 1/2 support age 18 or 19 - 23 full-time student? (Y, N)	____[17]	
Mark if legally blind	____[20]	____[21]
Date of birth	____[22]	____[24]
Date of death	____[26]	____[27]
Work/daytime telephone number/ext number	____[28] ____[29]	____[30] ____[31]
Home/evening telephone number	____[32]	____[33]
Do you authorize us to discuss your return with the IRS? (Y, N)	____[34]	

Present Mailing Address

Address ____[40]

Apartment number ____[41]

City, state postal code, zip code ____[42] ____[43] ____[44]

Foreign country name ____[46]

Foreign phone number ____[49]

In care of addressee ____[51]

Dependent Information

(*Please refer to Dependent Codes located at the bottom)

First Name [52]	Last Name	Date of Birth	Social Security No.	Relationship	Months*** in home	Dep Codes *	Dep Codes **	Care expenses paid for dependent

Name of child who lived with you but is not your dependent ____[53]

Social security number of qualifying person ____[54]

Dependent Codes

***Basic**
1 = Child who lived with you
2 = Child who did not live with you due to divorce/separation
3 = Other dependent
4 = Other dependents, but do not qualify for Credit for Other Dependents (ODC)
5 = Qualifying child for Earned Income Credit only
6 = Children who lived with you, but do not qualify for Earned Income Credit
7 = Children who lived with you, but do not qualify for Child Tax Credit
8 = Children who lived with you, but do not qualify for Child Tax Credit/Credit for Other Dependents/Earned Income Credit

****Other**
1 = Student (Age 19 - 23)
2 = Disabled dependent
3 = Dependent who is both a student and disabled

*****Months**
77 = Reported on odd year return
88 = Reported on even year return
99 = Not reported on return

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. __[1]

Primary account:

Financial institution routing transit number ____________[3]

Name of financial institution ____________[4]

Your account number ____________[5]

Type of account (1 = Savings, 2 = Checking, 3 = IRA*) __[6]

Mark if married filing jointly and this is a joint account (Both taxpayer and spouse names are on the account) __[9]

Mark if financial institution is foreign based (Not located in the territorial jurisdiction of the United States) __[10]

Enter the maximum dollar amount, or percentage of total refund Dollar ____________[11] **or** Percent (xxx.xx) ____________[12]

Secondary account #1:

Financial institution routing transit number ____________[27]

Name of financial institution ____________[28]

Your account number ____________[29]

Type of account (1 = Savings, 2 = Checking, 3 = IRA*) __[30]

Mark if married filing jointly and this is a joint account (Both taxpayer and spouse names are on the account) __[31]

Mark if financial institution is foreign based (Not located in the territorial jurisdiction of the United States) __[32]

Enter the maximum dollar amount, or percentage of total refund Dollar ____________[13] **or** Percent (xxx.xx) ____________[14]

Secondary account #2:

Financial institution routing transit number ____________[33]

Name of financial institution ____________[34]

Your account number ____________[35]

Type of account (1 = Savings, 2 = Checking, 3 = IRA*) __[36]

Mark if married filing jointly and this is a joint account (Both taxpayer and spouse names are on the account) __[37]

Mark if financial institution is foreign based (Not located in the territorial jurisdiction of the United States) __[38]

Enter the maximum dollar amount, or percentage of total refund Dollar ____________[17] **or** Percent (xxx.xx) ____________[18]

*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.

Refund - U.S. Series I Savings Bond Purchases

A tax refund may be used to buy up to $5,000 of U.S. Series I Savings bonds and registered for up to three different persons. If you would like to purchase U.S. Series I Savings bonds (in increments of $50) with your refund, if applicable, please complete the following information. Please note you may enter only one name per registration (with exception of married filing joint returns) and must enter the party's given name, do not use nicknames.

Indicate either a maximum dollar amount (up to $5,000), or percentage of refund you would like used to purchase bonds

The bonds will be registered to the name(s) on the return. For married filing joint returns this means the bonds will be registered in both names listed on the return.

To register the bonds separately, leave these fields blank and use the fields provided below.

Enter either a dollar amount or percent, but not both Dollar ____________[15] **or** Percent (xxx.xx) ____________[16]

Bond information for someone other than taxpayer and spouse, if married filing jointly

Maximum dollar amount (up to $5,000), or percentage of refund used to purchase bonds Dollar ____________[19] **or** Percent (xxx.xx) ____________[20]

Owner's name (First Last) ____________[40] ____________[41]

Co-owner or beneficiary (First Last) ____________[42] ____________[43]

Mark if the name listed above is a beneficiary __[44]

Bond information for someone other than taxpayer and spouse, if married filing jointly

Maximum dollar amount (up to $5,000), or percentage of refund used to purchase bonds Dollar ____________[23] **or** Percent (xxx.xx) ____________[24]

Owner's name (First Last) ____________[45] ____________[46]

Co-owner or beneficiary (First Last) ____________[47] ____________[48]

Mark if the name listed above is a beneficiary __[49]

Estimated Taxes

If you have an overpayment of 2022 taxes, do you want the excess:

Refunded ____[52]

Applied to 2023 estimated tax liability ____[53]

Do you expect a considerable change in your 2023 income? (Y, N) ____[54]

If yes, please explain any differences:

____________________[55]

____________________[56]

____________________[57]

____________________[58]

Do you expect a considerable change in your deductions for 2023? (Y, N) ____[59]

If yes, please explain any differences:

____________________[60]

____________________[61]

____________________[62]

____________________[63]

Do you expect a considerable change in the amount of your 2023 withholding? (Y, N) ____[64]

If yes, please explain any differences:

____________________[65]

____________________[66]

____________________[67]

____________________[68]

Do you expect a change in the number of dependents claimed for 2023? (Y, N) ____[69]

If yes, please explain any differences:

____________________[70]

____________________[71]

____________________[72]

____________________[73]

Payment method used to pay your estimated taxes (1=Electronic Federal Tax Payment System (EFTPS); 2=Direct Pay) ____[74]

2022 Federal Estimated Tax Payments

2021 overpayment applied to 2022 estimates + ____________[1]

Mark if you paid the calculated amounts on the dates due indicated below. Skip the remaining fields. ____[5]

If your estimated payments were not made on the date due or were for an amount other than the calculated amount below, please enter the actual date and amount paid.

	Date Due	Date Paid if After Date Due	Amount Paid	Calculated Amount	Method*
1st quarter payment	4/18/22	________[6]	+ ________[7]	________	________
2nd quarter payment	6/15/22	________[8]	+ ________[9]	________	________
3rd quarter payment	9/15/22	________[10]	+ ________[11]	________	________
4th quarter payment	1/17/23	________[12]	+ ________[13]	________	________
Additional payment		________[14]	+ ________[15]		

***Method of payment indicated in prior year**

EFW = Electronic funds withdrawal **EFTPS = Electronic Federal Tax Payment System**

Voucher = Form 1040-ES estimated tax payment voucher

NOTES/QUESTIONS:

2022 State Estimated Tax Payments

Taxpayer/Spouse/Joint (T, S, J) __[1]

State postal code ____[2]

Amount paid with 2021 return + ____________________[3]

2021 overpayment applied to '22 estimates + ____________________[4]

Treat calculated amounts as paid __[8]

	Date Paid	Amount Paid	Calculated Amount
1st quarter payment	______________[9]	+ ____________________[10]	____________________
2nd quarter payment	______________[11]	+ ____________________[12]	____________________
3rd quarter payment	______________[13]	+ ____________________[14]	____________________
4th quarter payment	______________[15]	+ ____________________[16]	____________________
Additional payment	______________[17]	+ ____________________[18]	

Interest Income

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

***Whole numbers will be treated as $ amounts. Enter percentages in the XXX.XX format. For example, enter 100% as 100.00 or 75.5% as 75.50.**

T/S/J	Type Code (**See codes below)			Interest Income [1]	Tax Exempt Income	Penalty on Early Withdrawal	U.S. Obligations* $ or %	Tax Exempt* $ or %	Foreign Taxes Paid	Prior Year Information
		1	Payer							
			Amounts	+						
		2	Payer							
			Amounts	+						
		3	Payer							
			Amounts	+						
		4	Payer							
			Amounts	+						
		5	Payer							
			Amounts	+						
		6	Payer							
			Amounts	+						
		7	Payer							
			Amounts	+						
		8	Payer							
			Amounts	+						
		9	Payer							
			Amounts	+						
		10	Payer							
			Amounts	+						

**Interest Codes		
Blank = Regular Interest	4 = Accrued Interest	6 = ABP Adjustment
3 = Nominee Distribution	5 = OID Adjustment	7 = Series EE & I Bond

	Control Totals +		Form ID: B-1

Dividend Income

Please provide copies of all Form 1099-DIV or other statements reporting dividend income.
***Whole numbers will be treated as $ amounts. Enter percentages in the XXX.XX format. For example, enter 100% as 100.00 or 75.5% as 75.50.**

T S J	Type Code (**See codes below)			Ordinary [2] Dividends	Qualified Dividends	Total Cap Gain Distributions	Section 1250	Sec. 199A	28% Capital Gain	Tax Exempt Dividends	U.S. Obligations* $ or %	Tax Exempt* $ or %	Foreign Taxes Paid	Prior Year Information
		1	Payer											
			Amounts +											
		2	Payer											
			Amounts +											
		3	Payer											
			Amounts +											
		4	Payer											
			Amounts +											
		5	Payer											
			Amounts +											
		6	Payer											
			Amounts +											
		7	Payer											
			Amounts +											
		8	Payer											
			Amounts +											
		9	Payer											
			Amounts +											
		10	Payer											
			Amounts +											

****Dividend Codes**	
Blank = Other	3 = Nominee

Other Income

			2022 Information	Prior Year Information
State and local income tax refunds			+ [5]	

	T/S	Agreement Date	2022 Information	Prior Year Information
Alimony received			+ [3]	
			+ [3]	

**Unemployment benefits are taxable income and should be reported on your return. Your 1099-G should show both the amount received and any amount of tax withheld.You may need to go to your state's Department of Labor website to get your 1099-G from your account.

	Taxpayer	Spouse	Prior Year Information
Unemployment compensation**	+ [9]	+ [10]	
Unemployment compensation federal withholding	+ [9]	+ [10]	
Unemployment compensation state withholding	+ [9]	+ [10]	
Unemployment compensation repaid	+ [12]	+ [13]	
Alaska Permanent Fund dividends	+ [18]	+ [19]	

T/S/J	Self-Employment Income ? (Y, N)	Other income, such as: Commissions, Jury pay, Director fees, Taxable scholarships	2022 Information	Prior Year Information
			+ [15]	
			+	
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NOTES/QUESTIONS:

Traditional IRA

	Taxpayer	Spouse
Are you or your spouse (if MFJ or MFS) covered by an employer's retirement plan? (Y, N)	__[1]	__[2]
Do you want to contribute the maximum allowable traditional IRA contribution amount? If yes, enter the applicable code: (1 = Deductible only, 2 = Both deductible and nondeductible)	__[3]	__[4]
Enter the total traditional IRA contributions made for use in 2022	+ ________[5]	+ ________[6]

	Taxpayer	Spouse
Enter the nondeductible contribution amount made for use in 2022	+ ________[5]	+ ________[6]
Enter the nondeductible contribution amount made in 2023 for use in 2022	+ ________[7]	+ ________[8]
Traditional IRA basis	+ ________[17]	+ ________[18]
Value of all your traditional IRA's on December 31, 2022:		
________	+ ________[19]	+ ________[20]
________	+ ________	+ ________
________	+ ________	+ ________
________	+ ________	+ ________
________	+ ________	+ ________
________	+ ________	+ ________
________	+ ________	+ ________
________	+ ________	+ ________
________	+ ________	+ ________
________	+ ________	+ ________

Roth IRA

Please provide copies of any 1998 through 2021 Form 8606 not prepared by this office

	Taxpayer	Spouse
Mark if you want to contribute the maximum Roth IRA contribution	__[29]	__[30]
Enter the total Roth IRA contributions made for use in 2022	+ ________[31]	+ ________[32]
Enter the amount a 2022 Roth IRA conversion should be adjusted by	+ ________[39]	+ ________[40]
Enter the total contribution Roth IRA basis on December 31, 2021	+ ________[43]	+ ________[44]
Enter the total Roth IRA contribution recharacterizations for 2022	+ ________[45]	+ ________[46]
Enter the Roth conversion IRA basis on December 31, 2021	+ ________[47]	+ ________[48]
Value of all your Roth IRA's on December 31, 2022:		
________	+ ________[49]	+ ________[50]
________	+ ________	+ ________
________	+ ________	+ ________
________	+ ________	+ ________
________	+ ________	+ ________
________	+ ________	+ ________
________	+ ________	+ ________
________	+ ________	+ ________
________	+ ________	+ ________
________	+ ________	+ ________

NOTES/QUESTIONS:

Schedule C - General Information

Preparer use only

	2022 Information	Prior Year Information
Taxpayer/Spouse/Joint (T, S, J)	__[2]	
Employer identification number	[3]	
Business name	[5]	
Principal business/profession	[6]	
Business code	[12]	
Business address, if different from home address on Organizer Form ID: 1040		
Address	[15]	
City/State/Zip	[16] [17] [18]	
Accounting method (1 = Cash, 2 = Accrual, 3 = Other)	__[19]	
If other:	[21]	
Inventory method (1 = Cost, 2 = LCM, 3 = Other)	__[22]	
If other enter explanation:	[24]	
Enter an explanation if there was a change in determining your inventory:	[25]	
Did you "materially participate" in this business? (Y, N)	__[26]	
If not, number of hours you did significantly participate	[28]	
Mark if you began or acquired this business in 2022	__[30]	
Did you make any payments in 2022 that require you to file Form(s) 1099? (Y, N)	__[31]	
If "Yes", did you or will you file all required Forms 1099? (Y, N)	__[33]	
Mark if this business is considered related to qualified services as a minister or religious worker	__[35]	
Did you receive wages as a statutory employee or as a minister? (1 = Statutory employee, 2 = Minister)	__[37]	
Medical insurance premiums paid by this activity	+ [40]	
Long-term care premiums paid by this activity	+ [44]	
Amount of wages received as a statutory employee	+ [47]	

Business Income

	2022 Information	Prior Year Information
Gross receipts and sales		
	+ [52]	
	+	
	+	
	+	
Returns and allowances	+ [55]	
Other income:		
	+ [57]	
	+	
	+	
	+	

Cost of Goods Sold

	2022 Information	Prior Year Information
Beginning inventory	+ [59]	
Purchases	+ [61]	
Labor:		
	+ [63]	
	+	
Materials	+ [65]	
Other costs:		
	+ [67]	
	+	
	+	
	+	
Ending inventory	+ [69]	

Schedule C - Expenses

Preparer use only

Principal business or profession ______

		2022 Information		Prior Year Information
Advertising	+	______	[6]	______
Car and truck expenses	+	______	[8]	______
Commissions and fees	+	______	[10]	______
Contract labor	+	______	[12]	______
Depletion	+	______	[14]	______
Depreciation	+	______	[16]	______
Employee benefit programs (Include Small Employer Health Ins Premiums credit):				
______	+	______	[18]	______
______	+	______		______
Insurance (Other than health):				
______	+	______	[20]	______
______	+	______		______
Interest:				
Mortgage (Paid to banks, etc.)				
______	+	______	[22]	______
______	+	______		______
______	+	______		______
Other:				
______	+	______	[24]	______
______	+	______		______
Legal and professional services	+	______	[26]	______
Office expense	+	______	[29]	______
Pension and profit sharing:				
______	+	______	[31]	______
______	+	______		______
Rent or lease:				
Vehicles, machinery, and equipment	+	______	[33]	______
Other business property	+	______	[35]	______
Repairs and maintenance	+	______	[37]	______
Supplies	+	______	[39]	______
Taxes and licenses:				
______	+	______	[41]	______
______	+	______		______
______	+	______		______
______	+	______		______
______	+	______		______
Travel and meals:				
Travel	+	______	[43]	______
Meals (Enter 100% subject to 50% limitation)	+	______	[45]	______
Meals (Enter 100% subject to DOT 80% limit)	+	______	[47]	______
Meals (Fully deductible)	+	______	[49]	______
Utilities	+	______	[51]	______
Wages (Less employment credit):				
______	+	______	[53]	______
______	+	______		______
Other expenses:				
______	+	______	[55]	______
______	+	______		______
______	+	______		______
______	+	______		______
______	+	______		______
______	+	______		______
______	+	______		______
______	+	______		______
______	+	______		______
	+			

	Control Totals+		Form ID: C-2

Home Office General Information

Preparer use only

Principal business or profession	____	[3]
Taxpayer/Spouse/Joint (T, S, J)	____	[4]
State postal code	____	[5]

Business Use of Home

	2022 Information		Prior Year Information
Total area of home	____	[14]	____
Area used exclusively for business	____	[16]	____
Information for day-care facilities only:			
Total hours used for day-care during this year	____	[18]	____
Total hours used this year, if less than 8760	____	[20]	____
Special computation for certain day-care facilities:			
Area used regularly and exclusively for day-care business	____	[22]	____
Area used partly for day-care business	____	[24]	

List as direct expenses any expenses which are attributable only to the business part of your home.
List as indirect expenses any expenses which are attributable to the overall upkeep and running of your home.

	2022 Information				Prior Year Information
	Direct Expenses		Indirect Expenses		
Mortgage interest:	+ ____	[29]	+ ____	[31]	____
Mortgage insurance premiums	+ ____	[34]	+ ____	[35]	____
Real estate taxes:	+ ____	[37]	+ ____	[39]	____
Excess mortgage interest	+ ____	[42]	+ ____	[43]	____
Insurance	+ ____	[48]	+ ____	[50]	____
Rent	+ ____	[54]	+ ____	[55]	____
Repairs & maintenance	+ ____	[57]	+ ____	[58]	____
Utilities	+ ____	[60]	+ ____	[61]	____
Other expenses, such as: Supplies & Security system					
____	+ ____	[63]	+ ____	[64]	____
____	+ ____		+ ____		____
____	+ ____		+ ____		____
____	+ ____		+ ____		____
____	+ ____		+ ____		____
____	+ ____		+ ____		____
____	+ ____		+ ____		____
____	+ ____		+ ____		____
____	+ ____		+ ____		____
____	+ ____		+ ____		____
Excess casualty losses			+ ____	[66]	
Carryovers:					
Operating expenses			+ ____	[67]	
Casualty losses			+ ____	[68]	
Depreciation			+ ____	[70]	
Business expenses not from business use of home, such as:					
Travel, Supplies, Business telephone expenses			+ ____	[71]	____
Depreciation			+ ____	[75]	____

NOTES/QUESTIONS:

Auto Worksheet

If you used your automobile for business purposes, please complete the following information.

Preparer use only

Description of business or profession [3]

Vehicles

Vehicle 1 -	Date placed in service	[4]
	Description	[5]
	Comments	
Vehicle 2 -	Date placed in service	[9]
	Description	[10]
	Comments	
Vehicle 3 -	Date placed in service	[14]
	Description	[15]
	Comments	
Vehicle 4 -	Date placed in service	[19]
	Description	[20]
	Comments	

Vehicle Questions

If you used your automobile for work purposes, answer the following questions:

	Vehicle 1	Prior Year	Vehicle 2	Prior Year	Vehicle 3	Prior Year	Vehicle 4	Prior Year
Was the vehicle available for off-duty personal use? (Y, N)	[60]		[62]		[64]		[66]	
Was another vehicle available for personal use? (Y, N)	[68]		[70]		[72]		[74]	
Do you have evidence to support your deduction? (Y, N)	[76]		[78]		[80]		[82]	
Is this evidence written? (Y, N)	[84]		[86]		[88]		[90]	

Vehicle Expenses

	Vehicle 1	Prior Year Information	Vehicle 2	Prior Year Information	Vehicle 3	Prior Year Information	Vehicle 4	Prior Year Information
Total miles for year	[32]		[34]		[36]		[38]	
Commuting miles	[40]		[42]		[44]		[46]	
Business miles before 7/1	[48]		[50]		[52]		[54]	
Business miles after 6/30	[56]		[57]		[58]		[59]	
Parking fees	+ [92]		+ [94]		+ [96]		+ [98]	
Tolls	+ [100]		+ [102]		+ [104]		+ [106]	
Gasoline	+ [108]		+ [110]		+ [112]		+ [114]	
Oil	+ [116]		+ [118]		+ [120]		+ [122]	
Repairs	+ [124]		+ [126]		+ [128]		+ [130]	
Maintenance	+ [132]		+ [134]		+ [136]		+ [138]	
Tires	+ [140]		+ [142]		+ [144]		+ [146]	
Car washes	+ [148]		+ [150]		+ [152]		+ [154]	
Insurance	+ [156]		+ [158]		+ [160]		+ [162]	
Interest	+ [164]		+ [166]		+ [168]		+ [170]	
Registration	+ [172]		+ [174]		+ [176]		+ [178]	
Licenses	+ [180]		+ [182]		+ [184]		+ [186]	
Property taxes	+ [188]		+ [190]		+ [192]		+ [194]	
Other vehicle expenses	+ [196]		+ [198]		+ [200]		+ [202]	
Vehicle rentals	+ [204]		+ [206]		+ [208]		+ [210]	
Inclusion amt **(Preparer only)**	+ [212]		+ [214]		+ [216]		+ [218]	
Depreciation	+ [220]		+ [222]		+ [224]		+ [226]	

Rent and Royalty Property - General Information

Preparer use only

	2022 Information	Prior Year Information
Description	[2]	
Taxpayer/Spouse/Joint (T, S, J) [3] — State postal code	[5]	
Physical address: Street	[6]	
City, state, zip code	[7] [8] [9]	
Foreign country	[11]	
Foreign province/county	[12]	
Foreign postal code	[13]	
Type (1=Single-family, 2=Multi-family, 3=Vacation/short-term, 4=Commercial, 5=Land, 6=Royalty, 7=Self-rental, 8=Other, 9=Personal ppty)	[14]	
Description of other type (Type code #8)	[15]	
Did you make any payments in 2022 that require you to file Form(s) 1099? (Y,N)	[16]	
If "Yes", did you or will you file all required Forms 1099? (Y, N)	[18]	
Fair rental days (If not full year) (For types 1, 2, 4, 5, 7 and 8 only) (Use Rent-2 for type 3)	[20]	
Percentage of ownership if not 100%	[22]	
Business use percentage, if not 100% (Not vacation home percentage)	[24]	

Rent and Royalty Income

Rents and royalties	2022 Information	Prior Year Information
	+ [33]	

Rent and Royalty Expenses

	2022 Information	Percent if not 100%	Prior Year Information
Advertising	+ [35]	[36]	
Auto	+ [38]	[39]	
Travel	+ [41]	[42]	
Cleaning and maintenance	+ [44]	[45]	
Commissions:			
	+ [47]	[49]	
	+		
Insurance:			
	+ [50]	[52]	
	+		
Legal and professional fees	+ [54]	[55]	
Management fees:			
	+ [57]	[59]	
	+		
Mortgage interest paid to banks, etc (Form 1098)			
	+ [60]	[62]	
	+		
Other mortgage interest	+ [63]	[65]	
Qualified mortgage insurance premiums	+ [66]	[67]	
Other interest:			
	+ [69]	[71]	
	+		
Repairs	+ [72]	[73]	
Supplies	+ [75]	[76]	
Taxes:			
	+ [78]	[80]	
	+		
Utilities	+ [81]	[82]	
Depreciation	+ [84]	[85]	
Depletion	+ [87]	[88]	
Other expenses:			
	+ [90]		
	+		
	+		
	+		

Control Totals+

Schedule A - Medical and Dental Expenses

T/S/J **2022 Information** **Prior Year Information**

Medical and dental expenses, such as: Doctors, Dentists, Hospital/nursing home fees, Lab/x-ray fees, Medical supplies, Hearing aids, Eyeglasses/contact lenses, and Insurance reimbursements received

__[1] ______ + ______[2] ______
__ ______ + ______ ______
__ ______ + ______ ______
__ ______ + ______ ______
__ ______ + ______ ______
__ ______ + ______ ______

Medical insurance premiums you paid:

Do not include pre-tax amounts paid by an employer-sponsored plan or amounts entered elsewhere, such as amounts paid for your self-employed business (Sch C, Sch F, Sch K-1, etc.) or Medicare premiums entered on Form SSA-1099.

__[4] ______ + ______[5] ______
__ ______ + ______ ______
__ ______ + ______ ______
__ ______ + ______ ______

Long-term care premiums you paid:

Do not include pre-tax amounts paid by an employer-sponsored plan or amounts entered elsewhere, such as amounts paid for your self-employed business (Sch C, Sch F, Sch K-1, etc.)

__[7] ______ + ______[8] ______
__ ______ + ______ ______

Prescription medicines and drugs:

__[10] ______ + ______[11] ______
__ ______ + ______ ______
__ ______ + ______ ______

__[13] Miles driven for medical items (1/1/22 - 6/30/22, 18 cents) ______[14]
__[16] Miles driven for medical items (7/1/22 - 12/31/22, 22 cents) ______[17]

Schedule A - Tax Expenses

T/S/J **2022 Information** **Prior Year Information**

State/local income taxes paid:

__[18] ______ + ______[19] ______
__ ______ + ______ ______
__ ______ + ______ ______
__ ______ + ______ ______
__ ______ + ______ ______

2021 state and local income taxes paid in 2022:

__[21] ______ + ______[22] ______
__ ______ + ______ ______
__ ______ + ______ ______

Real estate taxes paid:

__[24] ______ + ______[25] ______
__ ______ + ______ ______
__ ______ + ______ ______

Personal property taxes:

__[27] ______ + ______[28] ______
__ ______ + ______ ______

Other taxes, such as: foreign taxes and State disability taxes

__[30] ______ + ______[31] ______
__ ______ + ______ ______
__ ______ + ______ ______

Sales tax paid on major purchases:

__[36] ______ + ______[37] ______
__ ______ + ______ ______

Sales tax paid on actual expenses:

__[39] ______ + ______[40] ______
__ ______ + ______ ______
__ ______ + ______ ______

	Control Totals+		**Form ID: A-1**

Interest Expenses

T/S/J		2022 Interest Paid [2]	2022 Points Paid	Type*	Prior Year Information
	Home mortgage interest: From Form 1098				
__ [1]	______	+ ______	+ ______	__	______
__	______	+ ______	+ ______	__	______
__	______	+ ______	+ ______	__	______
__	______	+ ______	+ ______	__	______
__	______	+ ______	+ ______	__	______
__	______	+ ______	+ ______	__	______
__	______	+ ______	+ ______	__	______
__	______	+ ______	+ ______	__	______
__	______	+ ______	+ ______	__	______

*Mortgage Types
Blank = Used to buy, build or improve main/qualified second home 1 = Not used to buy, build, improve home or investment

Charitable Contributions

T/S/J		2022 Information	Prior Year Information
	Contributions made by cash or check (including out-of-pocket expenses)		
	Any contribution of cash, a check or other monetary gift requires a written record of the contribution in order to claim the contribution on your return.		
	Individual contributions of $250 or more must be accompanied by a written acknowledgment from the charity to claim the contribution on your return.		
__[2]		+ ______[3]	
__		+	
__		+	
__		+	
__		+	
__		+	
__		+	
__		+	
__		+	
__		+	
__		+	
__		+	
__		+	
__		+	
__		+	
__		+	
__[5]	Volunteer miles driven	______[6]	
	Noncash items, such as: Goodwill/Salvation Army/clothing/household goods		
__[8]		+ ______[9]	
__		+	
__		+	
__		+	
__		+	
__		+	
__		+	
__		+	
__		+	
__		+	

Miscellaneous Deductions

T/S/J		2022 Information	Prior Year Information
	Other expenses		
__[12]		+ ______[13]	
__		+	
__		+	
__		+	
__		+	
__		+	
__		+	
	Gambling losses: (Enter only if you have gambling income)		
__[15]		+ ______[16]	
__		+	
__		+	
__		+	

NOTES/QUESTIONS:

	Control Totals+		**Form ID: A-3**

Form ID: A-St	Miscellaneous Itemized Deductions (State Use Only)	59a

Complete the information below only if you file a state return in AL, AR, CA, HI, MN, NY or PA. Amounts entered here will be used to calculate your state return, but will be ignored for federal return purposes, as the deductions are not allowed.

T/S/J			2022 Information	Prior Year Information
	Unreimbursed expenses, such as: Uniforms, Professional dues, Business publications, Job seeking expenses, Educational expenses			
__[1]		+	[2]	
__		+		
__		+		
__		+		
__		+		
__		+		
__		+		
__		+		
__		+		
__		+		
	Union dues, other than amounts reported on Form W-2:			
__[4]		+	[5]	
__		+		
__		+		
__		+		
__[7]	Tax preparation fees	+	[8]	
	Other expenses, subject to 2% AGI limit, such as: Legal/accounting/custodial fees			
__[10]		+	[11]	
__		+		
__		+		
__		+		
__		+		
__		+		
__		+		
__		+		
__		+		
__[13]	Safe deposit box rental	+	[14]	
	Investment expenses, other than on Schedule(s) K-1 or Form(s) 1099-DIV/INT:			
__[16]		+	[17]	
__		+		
__		+		
__		+		
__		+		
__		+		
__		+		
__		+		

NOTES/QUESTIONS: