

# 2022 TAX CHECKLIST & QUESTIONNAIRE

Please check here if all names, SSN, DOB, etc. (all grayed boxes) stayed the same in 2022.

Name:	SSN:	DOB:	Occupation:
Primary Taxpayer:			
Secondary Taxpayer:			
Current Mailing Address:	Primary Phone:	Cell Phone:	Other:
	Primary Email Address:		
	Secondary Email Address:		

**Proof of identity is required such as a driver's license or state-issued photo ID to e-file.**

Expected Filing Status at the end of 2021:	Other Information:	Primary:	Secondary:
<input type="checkbox"/> Single	Are you blind or disabled?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
<input type="checkbox"/> Married	Are you a full-time student?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
<input type="checkbox"/> Married filing separately	\$3 Election campaign fund?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
<input type="checkbox"/> Widowed	Did you file taxes in 2019?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
<input type="checkbox"/> Head of Household			

Did your marital status change due to divorce, separation, death of a spouse, etc. in 2022?  Yes  No

Can you or your spouse be claimed as a dependent on someone else's tax return?  Yes  No

If so, have you or your spouse been claimed as a dependent on someone else's tax return?  Yes  No

Did you move or did your address change during the year?  Yes  No

Were you, your spouse, or any dependents ever a victim of identity theft?  Yes  No

Were you, your spouse, or any dependents ever issued an Identity Protection PIN (IP PIN)?  Yes  No

***If "Yes," provide Notice CP01A from the IRS for each party affected.***

## DEPENDENT / QUALIFIED CHILDREN:

Name:	SSN:	Birthdate:	Age:	Relationship:	Mos. In Home:	College Student:	Dependent's Gross Income:
						Yes / No	
						Yes / No	
						Yes / No	

Did you pay any qualified childcare expenses to a licensed daycare provider during 2022?  Yes  No

Did you provide over half the support for any other person during 2022?  Yes  No

Can another person **QUALIFY** to claim any of your dependents in 2022?  Yes  No

Did any dependent receive unearned income  $\geq 2,300$  in 2022?  Yes  No

Do you have any dependent children who must file a 2022 Federal or State tax return?  Yes  No

***As a courtesy, dependent children's tax returns are prepared free of charge.***

Do you want your refund direct deposited into a checking or savings account?  Yes  No

***If "Yes", please provide VOIDED CHECK or deposit slip.***



**TAXABLE INCOME: (Please check "✓" all that apply)**

- Wages, salary, tips, etc. (W-2s)
- Disability income (W-2)
- Tips not reported on W-2s
- Lyft, Uber, Airbnb, VRBO, etc. (1099-K or NEC)
- Taxable Interest (1099-INT, Bank Statements)
- Stock or mutual fund dividends (1099-DIV)
- IRA withdrawals, rollover, or transfer (1099-R)
- Pension income (1099-R)
- Annuity income, payments, or transfer (1099-R)
- Social Security Benefits (1099-SSA)
- Cancellation of debts (1099-C)
- Non-employee compensation (1099-NEC)
- Home or real estate sale (1099-S)
- Sale or mining of any crypto or virtual currency
- Foreign income or taxable investments
- Maintain foreign accounts or transactions
- Business or hobby income / loss (Schedule C)
- Gains on investments, land, etc. (1099-COMP)
- Rental property income (Schedule E)
- Partnership income (K-1)
- Estate income (K-1)
- Unemployment compensation (1099-G)
- Gambling / lottery winnings (W-2G)
- Payments from education accounts (1099-Q)
- Jury duty income
- Other: \_\_\_\_\_

**ADJUSTMENTS TO INCOME / Tax: (Please check "✓" yes or no to each question)**

- Did you incur any expense as a direct result of teaching (Educator Expense Deduction)?  Yes  No
- Did you own a Health Savings Account (1099-SA) individually or through work?  Yes  No
- Did you move as a member of the Armed Forces in 2022 (Moving Expense Deduction)?  Yes  No
- Did you contribute to a SEP, SIMPLE or other self-employed qualified plan in 2022?  Yes  No
- Did you withdraw funds from an IRA, 401(k), etc. prior to 59½ (Early Withdrawal Penalty)?  Yes  No
- Did you pay alimony (Alimony Adjustment)?  Yes  No
- Did you contribute to an Individual Retirement Account (IRA) or Roth IRA in 2022?  Yes  No

If "Yes", amount contributed: Taxpayer: \_\_\_\_\_ 2<sup>nd</sup> Taxpayer: \_\_\_\_\_

- Did you pay interest on a student loan (Student Loan Interest Deduction)?  Yes  No
- Did you receive a Health Insurance Marketplace Statement (1095-A) in 2022?  Yes  No
- Did you pay estimated taxes in 2021?  Yes  No

If yes, amount paid: 1<sup>st</sup> Quarter: Fed: \_\_\_\_\_ St: \_\_\_\_\_ 3<sup>rd</sup> Quarter: Fed: \_\_\_\_\_ St: \_\_\_\_\_  
2<sup>nd</sup> Quarter: Fed: \_\_\_\_\_ St: \_\_\_\_\_ 4<sup>th</sup> Quarter: Fed: \_\_\_\_\_ St: \_\_\_\_\_

- Did you make a Qualified Charitable Distribution (QCD) in 2022?  Yes  No

If yes, amount of QCD: \_\_\_\_\_

**ITEMIZED TAX DEDUCTIONS: (Please check "✓" all that apply)**

*Please note, the standard deduction for 2022 is \$12,550 for single filers and \$25,900 for joint filers under age 65.*

- Medical and Dental Expenses (> 7.5% AGI) \_\_\_\_\_
- Health Insurance / Medicare \_\_\_\_\_
- Long-Term Care Insurance \_\_\_\_\_
- State and Local Taxes \_\_\_\_\_
- New Motor Vehicle or Boat Sale Tax \_\_\_\_\_
- Real Estate Property Taxes \_\_\_\_\_
- Home Mortgage Interest / Points Paid \_\_\_\_\_
- Mortgage Insurance \_\_\_\_\_
- Donations to Charity (Documented) \_\_\_\_\_
- Casualty or Theft Losses \_\_\_\_\_
- Other: \_\_\_\_\_

- Did you itemize your tax deductions last year?  Yes  No

**TAX CREDITS & MISC.: (Please check "✓" yes or no to each question)**

- Did you install a geothermal, solar, or wind energy system to your primary residence in 2022?  Yes  No
- Did you make energy efficiency improvements to your primary residence in 2022?  Yes  No  
If so, please list the amount of **Lifetime Limitation** used (if any) prior to 2022? \$ \_\_\_\_\_
- Did you adopt a child in 2021 or have adoption credit carried over to 2022?  Yes  No
- Did you pay education tuition and fees for you, your spouse or dependent child in 2022?  Yes  No  
If so, please provide your Tuition Statement (**1099-T**), receipts for books, etc.
- Did you have a financial interest in or signature authority over a financial account or asset located in a foreign country?  Yes  No
- Did you pay any foreign income or investment tax?  Yes  No
- Did you contribute to a 401(k), 403(b), Simple IRA or other company retirement plan in 2022?  Yes  No

**WI STATE RETURN: (Please check "✓" yes or no to each question)**

- Did you purchase / renew a WI special tax-deductible license plate in 2022?  Yes  No
- Did you purchase (through internet, etc.) items where WI sales tax is due but not paid?  Yes  No
- Did you work in or receive income from a state other than WI?  Yes  No
- Did you pay state income tax to any state other than WI in 2022?  Yes  No
- Did you pay rent in 2022?  Yes  No
- Was heat **included**?  Yes  No
- Was heat **not included**?  Yes  No
- Did you pay WI state property tax for anyone other than yourself?  Yes  No
- Did you receive the WI Homestead Credit in 2021 or expect to receive the credit it in 2022?  Yes  No
- Did you contribute to WI's 529 college savings program (**Tomorrow's Scholar** or **EdVest**)?  Yes  No

**OTHER: (Please check "✓" yes or no to each question)**

- Were you ever audited or received any correspondence by the IRS?  Yes  No
- Were you ever delinquent in paying your taxes or ever modified your tax return after it was filed?  Yes  No
- Did you or your spouse make or receive gifts of over \$16,000 in 2022?  Yes  No
- Did you turn 72 prior to December 31st of 2023 (RMD)?  Yes  No

**2022 TAX PLANNING: (Please check "✓" yes or no to each question)**

- Do you plan to enroll in the Affordable Care Act health exchanges in 2023?  Yes  No
- Do you expect your income, withholdings or other financial to change in 2023?  Yes  No
- Will you file bankruptcy, have any lender forgive / cancel debts (credit cards, etc.) in 2023?  Yes  No
- Do you and / or your spouse plan to retire or have significant life / income changes in 2023?  Yes  No
- Do you expect to undergo any major-medical expenses in 2023?  Yes  No
- Do you expect to file bankruptcy, foreclose, or have any debt forgiven or cancelled in 2023?  Yes  No
- Will any dependent children turn 17 and NOT be entering college or vocational school in 2023?  Yes  No
- Will you turn 72 prior to December 31st of 2023? (RMD)  Yes  No

Notes: \_\_\_\_\_

\_\_\_\_\_

**REQUIRED DOCUMENTATION NEEDED TO COMPLETE YOUR TAX RETURNS:**

- \_\_\_\_\_  \_\_\_\_\_
- \_\_\_\_\_  \_\_\_\_\_