



Your 2022 Tax Organizer is enclosed and will assist you in collecting and reporting information necessary for us to prepare your 2022 tax return. It can serve as a guide when gathering your information. Where available, prior year data is included for your reference. Our 2022 Engagement Letter is also enclosed. **New for 2022, all clients must sign, date and return our engagement letter. In the case of joint tax returns, both the taxpayer and spouse must sign the letter.**

We still need the annual information forms that are sent to you for tax purposes and some other information. As a reminder, here is a simple checklist:

- W-2 for wages
- 1099-DIV for dividend income
- 1099-NEC for income
- 1099-R for retirement income
- 1098 for mortgage interest paid
- 1095-A, B or C for health insurance
- K-1 forms from investments in S corporations or partnerships
- Form 5498 for IRA values
- IRA and Roth IRA contributions for 2022
- Childcare costs, and the name, address, amount and tax ID # of the provider(s)
- Charitable donations-listed by charitable organization and total amounts contributed during 2022
- Property tax paid on your home, property or cars
- Estimated taxes paid and dates paid
- Any letters you received from the IRS or state tax authorities within the last year
- Our signed engagement letter, by all parties listed on the 2022 tax return (taxpayer and spouse, if applicable)
- W-2G for gambling
- 1099-B brokerage sales
- 1099-MISC for income
- 1099-G for refunds & unemployment
- 1098-T for tuition paid
- 1099-INT for interest income
- SSA-1099 Social Security
- 1099-K for income
- 1099-SA for HSAs
- 1099-Q for education distribution
- Any other tax forms received

For any non-cash contributions and donations of property, the IRS has additional substantiation requirements. For property under \$250, the donor must obtain a receipt from the charity or keep reliable records. Information may be obtained on the Web to assist in your valuation. A donor who claims a non-cash contribution of at least \$250 but not more than \$5,000 is required to obtain a contemporaneous written acknowledgment from the charity. For claimed non-cash contributions of \$5,000 or more, in addition to a contemporaneous written acknowledgment, the donor must obtain a qualified appraisal.

Thank you for your help in the completion of this organizer. Please contact us if you need assistance.

BISHOP & ADKINS, P. A.  
612 ROCK SPRING ROAD  
BEL AIR, MD 21014  
410-893-7453

## 2022 ENGAGEMENT LETTER

Bishop & Adkins, P.A. is pleased to provide you with the professional services described below. This letter confirms our understanding of the terms and objectives of our engagement and the nature and limitations of the services we will provide. The engagement between you and our firm will be governed by the terms of this agreement. **New this year, all engagement letters must be signed by the taxpayer (and spouse, in the case of a joint tax return).**

### Engagement Objective and Scope

We will prepare your 2022 federal form 1040 U.S. Individual Income Tax Return and your 2022 resident state individual income tax return.

We will not prepare any tax returns except those identified above. If you have taxable activity in a state/city or country other than those identified above, you are responsible for identifying the applicable returns and for providing our firm with all information necessary to prepare them. We will prepare your tax returns based upon information and representations that you provide to us. We have not been engaged to and will not prepare financial statements. We will not audit or otherwise verify the data you submit to us, although we may ask you to clarify certain information.

We will prepare the above-referenced tax returns solely for filing with the Internal Revenue Service (“IRS”) and applicable state or local tax authorities. Our work is not intended to benefit or influence any third party, either to obtain credit or for any other purpose.

You agree to indemnify and hold us harmless with respect to any and all claims arising from the use of the tax returns for any purpose other than filing with the IRS, state or local tax authorities regardless of the nature of the claim, including the negligence of any party.

Our engagement does not include any procedures designed to detect errors, fraud, theft, or other wrongdoing. Therefore, our engagement cannot be relied upon to disclose such matters. In addition, we are not responsible for identifying or communicating deficiencies in your internal controls. You are responsible for developing and implementing internal controls applicable to your operations.

This engagement is limited to the professional services outlined above.

### CPA Firm Responsibilities

Unless otherwise noted, we will perform our services in accordance with the Statements on Standards for Tax Services (“SSTs”) issued by the American Institute of Certified Public Accountants (“AICPA”) and U.S. Treasury Department Circular 230 (“Circular 230”). It is our duty to perform services with the same standard of care that a reasonable tax return preparer would exercise in this type of engagement. It is your responsibility to safeguard your assets and maintain accurate records pertaining to transactions. We will not hold your property in trust for you, or otherwise accept fiduciary duties in the performance of this engagement.

We will prepare your tax returns using the same filing status (single, married filing jointly, married filing separately, head of household or qualifying widow with dependent child) and dependents listed on your 2021 income tax returns unless you indicate otherwise in the Miscellaneous Questions section of our Tax Organizer.

#### Arguable positions

We will use our professional judgment to resolve questions in your favor where a tax law is unclear, provided that we have a reasonable belief that there is substantial authority for doing so. If there are conflicting interpretations of the law, we will explain the possible positions that may be taken on your return. We will follow the position you request, provided it is consistent with our understanding of tax reference materials. Tax reference materials include, but are not limited to, the Internal Revenue Code (“IRC”), tax regulations, Revenue Rulings, Revenue Procedures, Private Letter Rulings, court cases, and similar state and local guidance. If the IRS, state or local tax authorities later contest the position you select, additional tax, penalties, and interest may be assessed. You will be responsible for these amounts, as well as any related professional fees, you may incur to respond to the tax authority.

#### Confidentiality

If the tax returns prepared in connection with this engagement are filed using the married filing jointly filing status, both spouses are deemed to be clients of the firm under the terms of this agreement. Both spouses acknowledge that there is no expectation of privacy from the other concerning our services in connection with this agreement. We are at liberty to share with either of you, without prior consent of the other, documents and other information concerning the preparation of your tax returns.

#### Bookkeeping assistance

We may deem it necessary to provide you with accounting and bookkeeping assistance solely for the purpose of preparing the tax returns. These services will be performed solely in accordance with the AICPA Code of Professional Conduct. In the event we conclude that such services are necessary to prepare your tax returns, such services will be billed at our standard hourly rates and will be subject to the terms of this agreement.

#### Estimated tax payments

You may be required to make quarterly estimated tax payments in the tax jurisdictions noted in the Engagement Objective and Scope section of this agreement. We will calculate these payments for the 2023 tax year based upon the information you provide to prepare your 2022 tax returns (the “safe harbor” rule). Updating recommended quarterly estimated tax payments to more closely reflect your actual current year’s income is not within the scope of this engagement, unless requested by you, and agreed to by us. These services will be billed at our standard hourly rates and will be subject to the terms of this agreement.

#### Out of scope services

Tax planning services are not within the scope of this engagement. However, during the period covered by this agreement, you may ask questions, or we may, at our sole discretion, bring to your attention potential tax planning opportunities for your consideration (collectively “additional services”). Prior to proceeding with any additional services beyond those in the Engagement Objective and Scope section of this agreement, we will confirm our understanding of the scope of the additional services with you. Additional services will be billed at our standard hourly rates and will be subject to the terms of this agreement.

Consulting and assistance related to the Payroll Protection Program (PPP), Economic Injury Disaster Loan Program (EIDL), and the Employee Retention Credit (ERC) are not within the scope of this engagement.

#### Government inquiries

This engagement does not include responding to inquiries by any governmental agency or tax authority. If your tax return is selected for examination or audit, you may request our assistance in responding to such an inquiry. If you ask us to represent you, and we agree, we will confirm this engagement in a separate written agreement.

## **Client Responsibilities**

We will provide you with an income tax organizer to help you compile and document the information necessary to prepare your income tax returns. You will provide us with all data necessary to prepare your tax returns. Income from all sources, including those outside the U.S., is required to be reported.

### Documentation

You are responsible for maintaining adequate documentation to substantiate the accuracy and completeness of your tax returns. Our records are not a substitute for yours. You should retain all documents that provide evidence and support for reported income, credits, deductions, and other information on your returns, as required under applicable tax laws and regulations. You represent that you have such documentation and can produce it, if necessary, to respond to any audit or inquiry by tax authorities. You will be responsible for any liability, including but not limited to, additional tax, penalties, interest and related professional fees, resulting from the disallowance of tax deductions due to inadequate documentation.

### Gift tax returns

The IRS considers a gift to be any transfer to an individual, either directly or indirectly, where full consideration (measured in money or money's worth) is not received in return. Under federal tax law, certain gifts are taxable and subject to an annual gift tax exclusion amount, which for 2022, is \$16,000 per taxpayer. You are responsible for informing us if gift tax returns are required to be filed. If you ask us to prepare these returns, and we agree, we will bill you separately for this service.

### Gifts received from foreign persons

If you received a gift or bequest from a foreign person or trust, you may be required to file a separate IRS Form 3520, Annual Return To Report Transactions With Foreign Trusts and Receipt of Certain Foreign Gifts or Form 3520-A, Annual Information Return of Foreign Trust with a U.S. Owner. If you ask us to prepare this return, and we agree, we will bill you separately for this service.

### Personal expenses

You are responsible for ensuring that personal expenses, if any, are segregated from business expenses and that expenses such as meals, travel, vehicle use, gifts, charitable contributions, and related expenses are supported by documentation and records required by the IRS and other tax authorities. At your request, we are available to provide you with answers to your questions on the types of supporting records required.

### State and local filing obligations

You are responsible for determining your filing obligations with any state or local tax authorities, including but not limited to, income, franchise, sales, use, and property taxes or abandoned and unclaimed property. If upon review of the information you have provided to us, including information that comes to our attention, we believe that you may have additional filing obligations, we will notify you. You acknowledge that the scope of our services under this agreement does not include any services related to your compliance with filing obligations other than those identified in the Engagement Objective and Scope section of this agreement. If you ask us to prepare any other returns, and we agree, we will confirm this engagement in a written agreement. You will be responsible for penalties associated with the failure to file or untimely filing of any form for which we were not engaged to prepare.

### U.S. filing obligations related to foreign investments

Based on the information you provide, you may have additional filing obligations, including but not limited to:

- \* Ownership of or an officer relationship with respect to certain foreign corporations (Form 5471);
- \* Foreign-owned U.S. corporation or domestic disregarded entity (Form 5472);
- \* Foreign corporation engaged in a U.S. trade or business (Form 5472);
- \* U.S. transferor of property to a foreign corporation (Form 926);
- \* U.S. person with an interest in a foreign trust (Forms 3520 and 3520-A);
- \* U.S. person with interests in a foreign partnership (Form 8865);
- \* U.S. person with interests in a foreign disregarded entity (Form 8858); or
- \* Statement of specified foreign assets (Form 8938).

You are responsible for informing us of all foreign assets owned directly or indirectly, including but not limited to financial accounts with foreign institutions, other foreign non-account investments, and ownership of any foreign entities, regardless of amount. If upon review of the information you have provided to us, including information that comes to our attention, we believe that you may have additional filing obligations, we will notify you.

Per the Bank Secrecy Act, every year you must report certain foreign financial accounts, such as bank accounts, brokerage accounts and mutual funds, to the Treasury Department and keep certain records of those accounts. You report the accounts by filing a Report of Foreign Bank and Financial Accounts (FBAR) on Financial Crimes Enforcement Network (FinCEN) Form 114. The FinCEN Form 114 is not a tax return. If you ask us to prepare the FinCEN Form 114, and we agree, we will bill you separately for this service.

Failure to timely file the required forms may result in substantial civil and/or criminal penalties. By your signature below, you agree to provide us with complete and accurate information regarding any foreign investments in which you have a direct or indirect interest, or over which you have signature authority, during the above referenced tax year.

The foreign reporting requirements are very complex. If you have any questions regarding the application of the reporting requirements for your foreign interests or activities, please contact us and we will discuss with you. You will be responsible for penalties associated with the failure to file or untimely filing of any of these forms. Additionally, we reserve the right to withdraw from the engagement if the foreign issues you present are beyond the level of our firm's expertise.

#### Foreign filing obligations

You are responsible for complying with the tax filing requirements of any other country. You acknowledge and agree that we have no responsibility to raise these issues with you and that foreign filing obligations are not within the scope of this engagement.

#### Digital assets

There are specific tax implications of investing in digital assets (e.g., virtual currencies such as Bitcoin, non-fungible tokens, virtual real estate and similar assets). The IRS considers these to be property for U.S. federal income tax purposes. As such, any transactions in, or transactions that use, digital assets are subject to the same general tax principles that apply to other property transactions.

If you transacted in digital assets during the tax year, you may have tax consequences and/or additional reporting obligations associated with such transactions. You agree to provide us with complete and accurate information regarding any transactions in, or transactions that have used, digital assets during the applicable tax year. If you have any questions regarding your digital assets and/or transactions, please ask us, and we will respond in writing.

#### Ultimate responsibility

You have final responsibility for the accuracy of your tax returns. We will provide you with a copy of your tax returns and accompanying schedules and statements for review prior to filing with the IRS, state and local tax authorities, as applicable. You agree to review and examine them carefully for accuracy and completeness.

You will be required to verify and sign a completed Form 8879, IRS e-file Signature Authorization, and any similar state and local equivalent authorization form before your returns can be filed electronically. Some forms cannot be filed electronically and, in those cases, we will provide you with paper tax returns to be filed.

In the event that you do not wish to have your tax returns filed electronically, please contact our firm. You are responsible for reviewing the paper returns for accuracy, signing them, and filing them timely with the tax authorities.

### **Timing of the Engagement**

We expect to begin our services upon receipt of this executed agreement, the completed 2022 income tax organizer and all documents requested either in the organizer or by our office.

Our services will conclude upon the earlier of:

- \* the filing and acceptance of your 2022 tax returns by the appropriate tax authorities and mailing or delivery of non-electronically filed tax returns (if any) to you for your review and your filing with the appropriate tax authorities, except for the calculation of quarterly estimated tax payments, which services will conclude upon delivery of each recommended estimated tax payment,
- \* written notification by either party that the engagement is terminated, or
- \* one (1) year from the execution date of this Agreement.

### **Extensions of Time to File Tax Returns**

The original filing due dates for your federal and state tax returns are generally April 15, 2023. **Due to the high volume of tax returns prepared by our firm, we need to receive the information to prepare your tax returns as soon as possible, and no later than March 14, 2023, so that the returns may be completed by the original filing due date. While we never guarantee returns will be completed by the due date, information received after March 14, 2023 increases the likelihood that returns will not be completed by the due date.**

It may become necessary to apply for an extension of the filing deadline if there are unresolved issues or delays in processing, or if we do not receive all of the necessary information from you on a timely basis. Applying for an extension of time to file may limit your ability to make certain elections, extend the time available for a government agency to undertake an audit of your return and/or extend the statute of limitations to file a legal action. If we apply for an extension of time to file because you have not provided us all of the information needed to prepare the tax returns by the original due date, you agree to hold our firm harmless from any consequences arising from any election waived. All taxes owed are due by the original filing due date. **Additionally, if data was not provided timely, we may not be able to calculate the tax amounts owed with the extensions.** Note, too, that extensions may affect your liability for penalties and interest or compliance with governmental or other deadlines.

**To the extent you wish to engage our firm to apply for extensions of time to file tax returns on your behalf, you must notify us of this request in writing. Our firm reserves the right to not file these applications unless we receive an executed copy of this Agreement and your express written authorization to file for an extension. In some cases, your signature may be required on such applications prior to filing. Failure to timely request an extension of time to file can result in penalties for failure to file tax returns, which accrue from the original due date of the returns, and can be substantial.**

### **Penalties and Interest Charges**

Federal, state, and local tax authorities impose various penalties and interest charges for non-compliance with tax laws and regulations, including failure to file or late filing of returns, and underpayment of taxes. You will be responsible for the payment of any additional tax, penalties, and interest charges imposed by tax authorities.

### **Professional Fee**

Our fee for the services outlined above will be based on the complexity of, and time required to, complete the work. Circumstances may arise that impact our fee such as, but not limited to, issues encountered with the timely delivery, availability, quality, or completeness of the information you provide to us or other unanticipated items that arise during our engagement that require additional time in order to complete the agreed-upon services. You agree that you will deliver all records requested and respond to all inquiries made by our staff to complete this engagement on a timely basis. You agree to pay all fees and expenses incurred whether or not we prepare the tax returns.

We appreciate the opportunity to be of service and will be pleased to discuss this letter with you at your convenience. **Please sign and date this agreement and return it to us to acknowledge your acceptance.** We will not finalize our services until we receive the executed agreement.

Very truly yours,

Bishop & Adkins, P.A.

Agreed and accepted:

\_\_\_\_\_  
Taxpayer signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Spouse signature (if applicable; **required** if joint return)

\_\_\_\_\_  
Date

\_\_\_\_\_  
Comments or Additional Requests:

<b>2022</b>	<b>1040</b>	<b>US</b>	<b>Miscellaneous Questions</b>
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**Questions**

If any of the following items pertain to you or your spouse for 2022, please check the appropriate box and provide additional information if necessary.

**PERSONAL INFORMATION**

- | Yes                      | No                       |  |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Did your marital status change during the year?                              |
| <input type="checkbox"/> | <input type="checkbox"/> | Did your address change during the year?                                     |
| <input type="checkbox"/> | <input type="checkbox"/> | Could you be claimed as a dependent on another person's tax return for 2022? |

**DEPENDENTS**

- |                          |                          |  |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Were there any changes in dependents?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Were any of your unmarried children who might be claimed as dependents 19 years of age or older at the end of 2022?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have any children under age 19 or full-time students under age 24 at the end of 2022, with interest and dividend income in excess of \$1,150, or total investment income in excess of \$2,300? |

**HEALTH CARE COVERAGE**

- |                          |                          |  |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Did you and your dependents have healthcare coverage for the full year?                                  |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive IRS document Form 1095-A (Health Insurance Marketplace Statement), if so, please attach. |

**INCOME**

- |                          |                          |   |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive unreported tip income of \$20 or more in any month?   |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you cash any Series EE U.S. savings bonds issued after 1989 and pay qualified higher education expenses for yourself, your spouse, or your dependents?            |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive any disability income?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have any foreign income or pay any foreign taxes?   |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive alimony during 2022? If yes, please provide the document containing your alimony terms and agreement. Date of divorce or separation agreement: _____. |



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**Miscellaneous Questions****PURCHASES, SALES AND DEBT**

- Did you start a business or farm, purchase rental or royalty property, or acquire an interest in a partnership, S corporation, trust, or REMIC?
- Did you purchase or dispose of any business assets (furniture, equipment, vehicles, real estate, etc.), or convert any personal assets to business use?
- Did you buy or sell any stocks, bonds or other investment property in 2022?
- Did you purchase, sell, or refinance your principal home or second home, or did you take a home equity loan? If so, please provide the settlement sheets for the purchase, sale and/or refinance of all properties involved.
- Did you purchase a home in 2022 and you were overseas on official extended duty?
- Did you make any residential energy-efficient improvements or purchases involving solar, wind, geothermal or fuel cell energy sources?
- Did you have any debts canceled or forgiven?

**RETIREMENT PLANS**

- Did you receive a distribution from a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.)?
- Did you make a contribution to a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.)?
- Did you transfer or rollover any amount from one retirement plan to another retirement plan?
- Did you convert part or all of your traditional, SEP, or SIMPLE IRA to a Roth IRA in 2022?

**EDUCATION**

- Did you receive a distribution from an Education Savings Account or a Qualified Tuition Program?
- Did you, your spouse, or a dependent incur any tuition expenses that are required to attend a college, university, or vocational school? If so, please provide form(s) 1098T and a bursar's account statement for each institution attended.

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**Miscellaneous Questions****ITEMIZED DEDUCTIONS**

- Did you incur a loss because of damaged or stolen property?
- Did you work out of town for part of the year?
- Did you use your car on the job (other than to and from work)?

**ESTIMATED TAXES**

- Did you apply an overpayment of 2021 taxes to your 2022 estimated tax (instead of being refunded)?
- If you have an overpayment of 2022 taxes, do you want the excess applied to your 2023 estimated tax (instead of being refunded)?
- Do you expect your 2023 taxable income and withholdings to be different from 2022?

**MISCELLANEOUS**

- Do you want to electronically file your tax return?
- Do you want to allocate \$3 to the Presidential Election Campaign Fund?
- Does your spouse want to allocate \$3 to the Presidential Election Campaign Fund?
- May the IRS discuss your tax return with your preparer?
- Did you have an interest in or signature or other authority over a financial account in a foreign country, such as a bank account, securities account, or other financial account?
- Did you receive a distribution from, or were you the grantor of, or transferor to, a foreign trust or did you have an interest in any foreign assets or accounts?
- Was your home rented out or used for business?
- Did you have a medical savings account (MSA), a Medicare + Choice MSA, or acquire an interest in an MSA or a Medicare + Choice MSA because of the death of the account holder? Or, were you a policyholder who received payments under a long-term care (LTC) insurance contract or received any accelerated death benefits from a life insurance policy?
- Are you a member of the Armed Forces of the United States on active duty who moved pursuant to a military order related to a permanent change of station?

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**Miscellaneous Questions**

- Did you engage the services of any household employees?
- Were you notified or audited by either the Internal Revenue Service or the State taxing agency?
- Did you or your spouse make any gifts to an individual that total more than \$16,000, or any gifts to a trust?
- Did your bank account information change within the last twelve months?
- If you are eligible for a refund and would you like it deposited directly into your bank account? If so, please provide a voided, blank check showing the bank's name and routing number and your account number.
- Did you make a contribution to a 529 plan during 2022? If so, please provide documentation showing the plan name, beneficiary name, contribution amounts, and contribution dates.
- 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), such as, but not limited to, Bitcoin and other virtual currencies, NFTs and NILs?

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**BISHOP & ADKINS, P. A.**  
**612 ROCK SPRING ROAD**  
**BEL AIR, MD 21014**  
**Telephone number: 410-893-7453**  
**Fax number: 410-838-2859**  
**E-mail address:**

**Tax Return Appointment**

**Date:**  
**Time:**  
**Location:**

**This tax organizer will assist you in gathering information necessary for the preparation of your 2022 tax return. Please enter all pertinent 2022 information. If you have attached a government form for an item, check the box and do not enter a 2022 amount.**

**CLIENT INFORMATION**

**Taxpayer**

**Spouse**

First name and initial.....		
Last name.....		
Title/suffix.....		
Social security number....		
Occupation.....		
Date of birth (m/d/y).....		
Date of death (m/d/y).....		
1=blind.....		
Home phone.....		
Work phone.....		
Work extension.....		
Cell phone.....		
E-mail address.....		
Drivers License #.....		
Drivers License State.....		
Issue Date.....		
Expiration Date.....		

**Address**

Street address.....  
 Apartment number.....  
 City.....  
 State.....  
 ZIP code.....

**DEPENDENTS**

**Dependent No.**

**Dependent No.**

First name.....		
Last name.....		
Title/suffix.....		
Date of birth (m/d/y).....		
Date of death (m/d/y).....		
Date of adoption (m/d/y).....		
Social security number....		
Relationship.....		
Months lived at home.....		

**WAGES, SALARIES AND TIPS**

Employer Name:

<input type="checkbox"/>	
<input type="checkbox"/>	

**2022 Amount**

**2021 Amount**

**Attach Forms W-2**


**2022 1040 US Tax Organizer**

Please enter all pertinent 2022 information. If you have attached a government form for an item, check the box and do not enter a 2022 amount.

**INTEREST INCOME**

Payer Name:

<input type="checkbox"/>	_____
<input type="checkbox"/>	_____

2022 Amount	2021 Amount
Attach Forms 1099-INT	

**DIVIDEND INCOME**

Payer Name:

<input type="checkbox"/>	_____
<input type="checkbox"/>	_____

Attach Forms 1099-DIV	

**PENSION AND IRA INCOME**

Payer name:

<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____

Attach Forms 1099-R	

**GAMBLING WINNINGS**

Payer name:

<input type="checkbox"/>	_____
<input type="checkbox"/>	_____

Attach Forms W-2G	

Total gambling losses.....  
 Winnings not reported on Form W-2G.....


**OTHER GOVERNMENT FORMS - INCOME**

- Form 1099-B - Sales of stock (also include transaction history).....
- Form 1099-MISC - Miscellaneous income.....
- Form 1099-K - Merchant card and third party network payments.....
- Form 1099-S - Sales of real estate (also include closing statements).....

Attach Forms 1099	
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- Form 1099-G - State tax refunds.....

Attach Forms 1099	
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Taxpayer:

- Form SSA-1099 - Social security benefits.....
- Form 1099-G - Unemployment compensation.....

Attach Forms 1099	

Spouse:

- Form SSA-1099 - Social security benefits.....
- Form 1099-G - Unemployment compensation.....

Attach Forms 1099	

**MISCELLANEOUS INCOME**

Alimony received.....  
 Spouse: Alimony received.....


Other:

_____
_____


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Please enter all pertinent 2022 information. If you have attached a government form for an item, check the box and do not enter a 2022 amount.

**RETIREMENT PLAN CONTRIBUTIONS**

Taxpayer:

- Traditional IRA contributions (1=maximum).....
- Roth IRA contributions (1=maximum).....
- Self-employed SEP, SIMPLE, & qualified plan contributions (1=maximum)

2022 Amount	2021 Amount

Spouse:

- Traditional IRA contributions (1=maximum).....
- Roth IRA contributions (1=maximum).....
- Self-employed SEP, SIMPLE, & qualified plan contributions (1=maximum)


**OTHER GOVERNMENT FORMS - DEDUCTIONS**

- Form 1098-E - Student loan interest.....
- Form 1098-T - Tuition and related expenses.....

<b>Attach Forms 1098</b>	

**Affordable Care Act**

- Form 1095-A - Health Insurance Marketplace Statement.....

<b>Attach Forms 1095</b>	
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**ADJUSTMENTS TO INCOME**

Taxpayer:

- Self-employed health insurance premiums.....
- Educator expenses.....
- Expenses from rental of personal property.....


Other adjustments to income:

\_\_\_\_\_


Alimony Paid - Recipient name & SSN

\_\_\_\_\_

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Spouse:

- Self-employed health insurance premiums.....
- Educator expenses.....
- Expenses from rental of personal property.....


Other adjustments to income:

\_\_\_\_\_


Alimony Paid - Recipient name & SSN

\_\_\_\_\_

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**MEDICAL AND DENTAL EXPENSES**

- Prescription medicines and drugs.....
- Doctors, dentists and nurses.....
- Hospitals and nursing homes.....
- Insurance premiums.....
- Taxpayer: Long-term care premiums.....
- Spouse: Long-term care premiums.....
- Insurance reimbursements.....
- Out-of-pocket lodging and transportation expenses.....
- Number of medical miles.....


Other:

\_\_\_\_\_

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**2022 1040 US Tax Organizer**

Please enter all pertinent 2022 information. If you have attached a government form for an item, check the box and do not enter a 2022 amount.

**MEDICAL AND DENTAL EXPENSES (Continued)**

Other:	2022 Amount	2021 Amount
_____		

**TAXES PAID**

State income taxes - 1/15 payment on 2021 state estimate.....		
State income taxes - paid with 2021 state extension.....		
State income taxes - paid with 2021 state return.....		
State income taxes - paid for prior years and/or to other states.....		
City/local income taxes - 1/15 payment on 2021 city/local estimate.....		
City/local income taxes - paid with 2021 city/local extension.....		
City/local income taxes - paid with 2021 city/local return.....		
State and local sales taxes paid (except autos and special items).....		
Use taxes paid on 2022 purchases.....		
Use taxes paid on 2021 state return.....		
Sales tax on autos not included above.....		
Sales taxes paid on boats, aircraft and other special items.....		
Real estate taxes - principal residence.....		
Real estate taxes - property held for investment.....		
Foreign income taxes.....		

Other:	2022 Amount	2021 Amount
_____		
_____		

<input type="checkbox"/> Personal property taxes (including automobile fees in some states).....	<b>Attach Tax Notice</b>	
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**INTEREST PAID**

Home mortgage interest and points paid		
<input type="checkbox"/> _____	<b>Attach Forms 1098</b>	
<input type="checkbox"/> _____		

Home mortgage interest not on Form 1098 (include name, SSN, & address of payee)		
_____		
_____		

Points not reported on Form 1098		
_____		
_____		
Mortgage insurance premiums on post 12/31/06 contracts.....		

Investment interest (interest on margin accounts):		
_____		
_____		
Passive Interest.....		

**CASH CONTRIBUTIONS**

Note: No deduction is allowed for cash or check contributions unless the donor maintains a bank record, or a written communication from the donee, showing the name of the organization, contributions date(s), and contribution amount(s).

_____		
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2022

1040

US

Tax Organizer

Please enter all pertinent 2022 information. If you have attached a government form for an item, check the box and do not enter a 2022 amount.

CASH CONTRIBUTIONS (Continued)

Volunteer Expenses (out-of-pocket).....
Number of charitable miles.....

2022 Amount

2021 Amount

Table with 2 columns: 2022 Amount, 2021 Amount. Rows for Volunteer Expenses and Number of charitable miles.

NONCASH CONTRIBUTIONS

Note: No deduction is allowed for contributions of clothing and household items that are not in good used condition or better. In addition, a deduction for any item with minimal monetary value may be denied.

Blank lines for non-cash contributions.

Table with 2 columns for 2022 and 2021 amounts.

MISCELLANEOUS DEDUCTIONS

Union and professional dues.....
Tax return preparation fee.....
Safe deposit box rental.....
Investment expenses.....
Estate tax, section 691(c).....

Unreimbursed employee expenses:

Blank line for unreimbursed employee expenses.

Other:

Blank lines for other miscellaneous deductions.

Table with 2 columns for 2022 and 2021 amounts. Rows for Union and professional dues, Tax return preparation fee, Safe deposit box rental, Investment expenses, Estate tax, section 691(c), Unreimbursed employee expenses, and Other.



2022

1040

**Direct Deposit & Estimates (Form 1040 ES)**

**3, 6**

Please enter all pertinent 2022 information.

**DIRECT DEPOSIT / ELECTRONIC PAYMENT (3)**

1=direct deposit of federal tax refund into bank account .....		
1=electronic payment of balance due .....		
1=electronic payment of estimated tax .....		
1=state direct deposit .....		
1=state electronic payment of balance due .....		

**BANK INFORMATION**

Name of Bank	Percent to Deposit (xx.xx)	Routing Number	Account Number	Type of Account (Table 1)	Type of Invest. (Table 2)

**2022 ESTIMATED TAX / 1040-ES (6)**

**Federal**

	Amount Paid	Date Paid	TS	2022 Voucher Amount
Overpayment applied from 2021 .....				
1st quarter payment .....				
2nd quarter payment .....				
3rd quarter payment .....				
4th quarter payment .....				
<div style="border: 1px solid black; padding: 5px; width: fit-content;">Additional Estimated Tax Payments</div>				
Paid with extension .....				
Former spouse SSN if joint estimates .....				

**State**

	Amount Paid	Date Paid	TS	2022 Voucher Amount
Overpayment applied from 2021 .....				
1st quarter payment .....				
2nd quarter payment .....				
3rd quarter payment .....				
4th quarter payment .....				
<div style="border: 1px solid black; padding: 5px; width: fit-content;">Additional Estimated Tax Payments</div>				
Paid with extension .....				

**1 Type of Account**

1 = Savings  
2 = Checking

**2 Type of Investment**

1 = Checking or savings (default)      6 = Coverdell savings account (ESA)  
 2 = Taxpayer's IRA (next year limits)      7 = Other  
 3 = Spouse's IRA (next year limits)      8 = Taxpayer's IRA (current year limits)  
 4 = Health savings account (HSA)      9 = Spouse's IRA (current year limits)  
 5 = Archer MSA

**3, 6**

2022

1040

US

Direct Deposit & Estimates (Form 1040 ES) (cont.)

7.1

Please enter all pertinent 2022 information.

**APPLICATION OF 2022 OVERPAYMENT (7.1)**

If you have an overpayment of 2022 taxes, do you want the excess refunded?  or applied to 2023 estimate?

Other (please explain): \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**2023 ESTIMATED TAX INFORMATION**

Do you expect your 2023 taxable income to be different from 2022? ..... Yes  No

If "yes" explain any differences in income, deductions, dependents, etc.: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Do you expect your 2023 withholding to be different from 2022? ..... Yes  No

If "yes" explain any differences: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

7.1

