



## Income Tax Organizer for 2022

**Client Name:** \_\_\_\_\_

January 27, 2023

We wish you have a happy and prosperous new year.

This organizer should help you gathering income tax documents for your 2022 individual income tax return.

Please send us the completed organizer along with supporting documents.

### CLIENT INFORMATION

**1. Taxpayer & Spouse** – if no change, check this box

Name	Taxpayer	Spouse
Date of Birth		
Social Security No.		
Occupation		
Email ( <b>be sure to fill out for tax return copy</b> )		
Mailing Address		
County of Residence		
Telephone (Circle): Cell or Home		
IRS Identity Protection Pin (IP PIN)		

### **2. Dependents**

Name	Relationship/Months Lived at Home	Date of Birth	Annual Income	Social Security No.

**3. Provide bank account information if changed.**

**Bank Name:** \_\_\_\_\_  
**Routing No:** \_\_\_\_\_  
**Account No:** \_\_\_\_\_

**4. Virtual Currency Transactions during 2022:** Yes ( ) No ( )

## **ESTIMATED TAX PAID FOR 2022**

Due Date	Federal Income Tax	Paid On (Date)	State Income Tax	Paid On (Date)
1st est. on 4/18/22				
2nd est. on 6/15/22				
3rd est. on 9/15/22				
4th est. on 1/17/23				
Total				

## **INCOME**

- 1) Wage Statement (Form W-2): Taxpayer \_\_\_\_\_ each Spouse \_\_\_\_\_ each
- 2) Interest Income (Form 1099-INT) and Dividend Income (Form 1099-DIV): Attach any Form 1099s.
- 3) Dependent's income (Form W-2, Form 1099-INT, Form 1099-DIV, etc)
- 4) Other income

Type of Income	Form	Amount
Prior Year State Tax Refunds	Form 1099-G	
Alimony (Divorce before 1/1/2019)		
IRA, Pension & Annuities	Form 1099-R	
Distribution from an HSA, Archer MSA, or Medicare Advantage MSA	Form 1099-SA	
Payments from Qualified Education Programs (Under Section 529 and 530)	Form 1099-Q	
Unemployment Compensation	Form 1099-G	
Social Security Benefits	Form SSA-1099	
Gambling Winnings & Lottery Winnings	Form W-2G	
Schedule K-1 from Partnership, S corporation, LLC or etc.	Schedule K-1	
Cancellation of Debt	Form 1099-C or A	
Miscellaneous Income	Form 1099-MISC	
Nonemployee Compensation	Form 1099-NEC	
Payment Card and Third-Party Network Transactions	Form 1099-K	
Capital gain (loss), Stock, Bond, Virtual Currency	*See below	

- Gain or loss on securities trading such as stocks, bonds or virtual currency: Attach brokerage statement, Form 1099-B
- Provide escrow paper, property tax bill, & owner carry note if house, real property sold

## **ITEMIZED DEDUCTIONS**

### 1) Medical Expenses:

- a) Medicine and Drug \$ \_\_\_\_\_
  - b) Health Insurance Premium \_\_\_\_\_
  - c) Doctors, Dentists, Hospitals \_\_\_\_\_
  - d) Eye Glasses, Hearing Aids, Etc. \_\_\_\_\_
  - e) Weight loss program \_\_\_\_\_
- \* Reimbursement from Insurance Company \_\_\_\_\_



6) Student Loan Interest: Attach Form 1098-E

Total interest paid	\$	Year you paid first principal payment	
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7) Education Credit: Attach Form 1098-T

Student Name		Grade	
Tax ID #		Address	
Tuition Paid	\$	Name of School	

8) Child & Dependent Care Credit: Only if both spouses have earned income or are full-time students.

Organization Name		Tax ID #	
Address			
Amount Paid	\$	Tel	

9) Provide Escrow Closing Statement if you acquired home, investment property or business.

10) Residential Clean Energy Credit: Attach Invoice

Where and what were improved: \_\_\_\_\_  
 Period: \_\_\_\_\_ Cost: \$ \_\_\_\_\_

11) Provide a contract if you purchased electric car.

12) You must file a gift tax return when the annual gift amount per donee exceeds \$16,000 during 2022.

**13) Health Insurance Coverage**

- Did you and your dependent have healthcare coverage for the full-year? Yes ( ) No ( )
- Did you receive any of the following IRS Documents? Form 1095-A (Health Insurance Marketplace Statement), 1095-B (Health Coverage) or Form 1095-C (Employer Provided Health Insurance offer and Coverage) If so, please attach.
- If you or your dependents did not have health care coverage during the year, do you fall into one of the following exemption categories: Indian tribe membership, health care sharing ministry membership, religious sect membership, incarceration, general hardship or unable to renew existing coverage? If you received an exemption certificate, please attach.

**14) Foreign Bank Account Reporting (FBAR) and Foreign Account Tax Compliance Act (FATCA)**

• **FBAR (Form 114)**

United States persons are required to file by 4/18/23 if:

1. The United States person had a financial interest in or signature authority over at least one financial account located outside of the United States; and
2. The aggregate value of all foreign financial accounts exceeded \$10,000 at any time during the calendar year to be reported

• **Foreign Financial Assets (Form 8938)**

United States taxpayers are required to report financial accounts maintained at financial institutions outside the U.S., such as bank accounts, investment accounts, mutual funds, stocks, bond, virtual currency, interest in a foreign entity and any financial instrument or contract that has an issuer or counterparty that is not a U.S. person if the value exceeds the threshold set forth by the IRS.

Status	Residence	Value – Any Day	Value - Last Day
Single	US	\$ 75,000	\$ 50,000
Married	US	\$ 150,000	\$ 100,000
Single	Foreign Country	\$ 300,000	\$ 200,000
Married	Foreign Country	\$ 600,000	\$ 400,000

**15) Foreign Trust and Foreign Gifts (Form 3520)**

United States persons are required to file Form 3520 if:

- They have ownership of foreign trusts or certain transactions with foreign trusts,
- They receive more than \$100,000 from a nonresident alien individual or a foreign estate, or
- They receive more than \$17,339 from foreign corporations or foreign partnerships