

2022 Tax Preparation Worksheet

Please use this worksheet to guide and assist you in compiling the information needed to prepare your income tax return. Please fill in as much information as you can. We will review this information and all other deductions not listed on this form. If we did not prepare your tax return last year, please bring a copy for our review.

Taxpayer Name: _____ **SS#:** _____ - _____ - _____ **DOB:** _____

Best Phone: _____ **Type** _____ **Blind?** _____

Email: _____

Spouse's Name: _____ **SS#:** _____ - _____ - _____ **DOB:** _____

Best Phone: _____ **Type** _____ **Blind?** _____

Email: _____ **Did your marital status change in 2022?** _____

A copy of both spouse's state issued driver licenses is required for e-filing.

Dependent Name (Last if different)

Soc Sec # **DOB** **Relationship**

1 _____
_____ - _____ - _____ / / _____

2 _____
_____ - _____ - _____ / / _____

3 _____
_____ - _____ - _____ / / _____

Any new dependents this year?

If yes, please provide copy of Social Security card

For each child please provide a written document that shows the child lives with you. Must have child's address the same as your address (i.e. report card, medical bills, daycare provider statement)

Taxes Paid

Property Tax on Home \$ _____

Other Real Estate Tax \$ _____

Personal Property Tax \$ _____ (Vehicle/Motor Home/Boats)

Questions (check all that apply)

Did/Will you contribute to an IRA for 2022? _____ What type? Traditional/Roth/SEP

Did you buy or sell a home in 2022? _____ *If yes attach HUD Statement.*

Did you do anything to improve the energy efficiency of your home or purchase an alternative energy vehicle? _____

Do you have any foreign bank accounts, trusts, or businesses? _____

Did any dependent have \$1,100+ of **unearned** income (dividends/interest/capital gains)? _____

Did you pay/receive alimony? \$ _____ Date of divorce _____ If you paid, Social Security # of the person who you paid.

Did you fix/replace your personal septic system? _____

Did you pay rent in Massachusetts? _____ If yes how much \$ _____

Did you go through bankruptcy proceedings or have any debt forgiven, cancelled or refinanced? _____

If you had income from... then provide

_____ Wages	W-2
_____ Gambling	W-2G
_____ Paid Family/Medical Leave	1099-G
_____ Unemployment	1099-G
_____ Social Security	1099-SSA
_____ Interest	1099-INT
_____ Dividends	1099-DIV
_____ Pensions, IRA or retirement	1099-R
_____ Capital Gains	1099-B
_____ Debt Cancellation	1099-C
_____ 529 Distribution	1099-Q
_____ Third Party Network	1099-K
_____ Partnership or S Corp	K-1

Estimated Payments: Please list the date and amount paid for any 2022 estimates.

Date	Federal	State of _____
____/____/____	\$ _____	\$ _____
____/____/____	\$ _____	\$ _____
____/____/____	\$ _____	\$ _____
____/____/____	\$ _____	\$ _____

Medical Expenses (these must exceed 7.5% of your income to be deductible)

Medical/Dental Insurance: \$ _____
 (Do not include Medicare or pretax medical insurance paid through your employer)

Long Term Care Ins:
 Taxpayer \$ _____ Spouse \$ _____
 Prescriptions: \$ _____ Dental \$ _____
 Copays (Dr./Clinic/Hospital): \$ _____ Therapy \$ _____
 Vision \$ _____ Hearing Aids \$ _____
 Medical Miles _____ Medical Parking/Tolls \$ _____

Interest Paid:

Provide all form 1098 for mortgages and home equity loans. Note: mortgage proceeds must have been used to purchase, build or improve the home.

Did you pay points on a refinance in 2022 not listed on your form 1098? \$ _____

Interest paid on a margin loan or other investment interest: \$ _____

Charity: You must have either a cancelled check or receipt for all contributions up to \$250 at one time, and a receipt for any contribution over \$250 at one time.

Total in 2022 by cash or check that you have a proper documentation for: \$ _____

Total receipted non-cash contributions \$ _____ If the total is over \$500, please send receipts for all non-cash donations as this needs to be reported to IRS.

Other Information:

Teacher Expense \$ _____ (up to \$300)
 Gambling Losses: \$ _____ (up to any reportable winnings)
 Student Loan interest \$ _____ (include Form 1098-E)
 College Tuition _____

For each student, please provide Form 1099-T, a copy of the bill from the college for each semester, and receipts for books, supplies and equipment.

Child Care _____
For each child, please provide amount paid and providers name and tax id number.

Rental Income _____

Please provide a list of rental income & expenses by property.

Self-employment _____

*Please provide a list of income and expenses for your business as well as a mileage log.
 Please provide amounts received from the SBA for PPP loans or EIDLs*

Direct Deposit for refund:

Bank Name _____
 Routing # (9 digits) _____
 Account # _____
 Checking or Savings? (circle one)