

2022 Tax Document Checklist

TP	SP	Did you (TP) or your spouse (SP) have any of the below listed income items?	If yes, send the following documents/information
		Wages / Salary / Tips	W-2 and final paystub for each job. Active Duty Military, please send Dec LES.
		Interest	1099-INT or Dec bank statement if no 1099
		Dividends	1099-DIV
		Retirement / Pension	1099-R. Retired military-please send Dec RAS
		Retirement or IRA distribution before age 59 1/2	Contribution records for IRA, Forms 5498 for each year since account opened
		State Tax Refund	1099-G or 2021 state tax return
		Social Security	1099-SSA
		Unemployment Compensation or Paid Family Leave	1099-G
		Self-Employment and/or Operation of a Business	1099-NEC, Profit & Loss Statement, Balance Sheet, 2022 Bank Statements
		Rental Property	Rental worksheet for EACH property. Contact us if this is the first year that WE are preparing rental tax return
		Rental of land for agricultural purposes	Rental Worksheet
		Operation of a farm income	1099-MISC, Profit & Loss Statement, Balance Sheet, 2022 Bank Statements
		Royalties	1099-MISC
		Gambling Winnings	W2G, record of wins and losses
		Sale of Stocks, Bonds, Mutual Funds, etc.	1099B, Cost Basis, if not included on form
		Sale of Rental or Business property	Closing Disclosure, Depreciation Schedule
		Cancellation of Debt	1099-C, Request Insolvency Worksheet
		Sale of Home	1099-S, Purchase & Sale Closing Disclosures/HUD-1 Statements
		Income from Investment/Partnership/S-Corp	K-1
		Income from Estate or Trust	K-1
		Contributions to a Health Savings Account	Form 5498, usually issued in May
		Alimony payments received	Amount Received, date of divorce
		Alimony payments paid	Amount Paid, date of divorce, name & SSN of recipient
		Foreign earned income	Final paystub and foreign tax return, if applicable
		Hobby Income	1099-NEC or record of amounts received
		Difficulty of Care Payments	W2 or 1099NEC
		Miscellaneous/other income	Prizes, jury duty, 1099-NEC, or 1099-MISC

TP	SP	Did you (TP) or your spouse (SP) have any of the below listed deductions/expenses?	If yes, send the following documents/information
		Contributions to a pension plan (401k/403b/TSP)?	Reflected on your W-2, or send record of deposits
		Contributions to: Roth IRA? Trad IRA? SEP-IRA?	Amount contributed, Form 5498 (issued in May)
		Reservists/National Guard expenses for traveling >100 miles each direction for Reservist/Guard duties	Reservist Worksheet
		Unreimbursed moving expenses	Military only
		Teaching or classrooms supplies (K - 12 only)	Record of expenses paid
		Distributions from a Health Savings Account	1099-SA
		Home Mortgage Interest	Form 1098
		Real Estate Tax	Form 1098 or record of date and amount of payments
		Property Tax on Vehicles	Payment receipt, showing amount paid for tax
		Purchase Real Estate	Closing Disclosure
		Refinance real estate property	Closing Disclosure
		Student Loan Interest	1098-e
		Qualified Tuition or Education expenses	1098-T, receipts for books and supplies, Due Diligence Worksheet for Education Expenses
		Make contributions to charity	Receipts, including FMV of non-cash donations
		Medical Expenses or after-tax premium payments	Receipts, if they exceed 7.5% of income
		Have any Household Employees	W2 issued to them and record of payments
		Pay any Child or Dependent Care Expenses	Name, address, SSN/EIN of provider, total paid to each provider, total paid for each dependent
		Make payments to IRS for 2022 taxes	Dates and amounts paid
		Make payments to state for prior year and/or 2022 taxes	Dates and amounts paid
Yes	No	ALL CLIENTS, Please answer these questions	Send the following documents/information
		Were there any births, adoptions, marriages, divorces, or deaths in your household?	Date of event and SS Card (for birth, adoption, and marriage)
		Did you receive, sell, exchange, or otherwise dispose of any Virtual Currency?	Request Due Diligence Worksheet for Virtual Currency
		Are you a signer on any Foreign Accounts?	Request Due Diligence Worksheet for Foreign Bank Accounts
		Did your driver's license expire in 2022 or 2023?	Clear Copy of renewed DL
		Do you wish us to use the same account as last year for refunds or taxes owed?	If NOT the same account, send new bank account info
Use back for Additional Notes to the Tax Preparer:			
TP Signature and Date		SP Signature and Date	