ANDERSON
LEGAL, BUSINESS & TAX ADVISORS

Dear Valued Client,

This Tax Organizer is designed to help you gather the tax information needed for Anderson to prepare your personal income tax return for 2022.

Please fill the tax organizer to the best of your ability. Enter all 2022 information for which you do not have official documentation. If any information does not apply to you, please disregard that part of the organizer.

1. **Complete the Tax Organizer**
   - Enter all 2022 information. If any information does not apply to you or is incorrect, please draw a line through it or make necessary changes.
2. **Gather your supporting documents and make copies.**
   - See list below for examples.
   - Send the copies with your completed organizer and keep originals.
3. **Submit the Tax Organizer, and any supporting documentation, using one of these methods:**
   - Upload to your Box account [https://andersonadvisors.app.box.com/], then email accountingadmins@andersonadvisors.com to let us know you have uploaded the organizer.
   - Fax: 702-664-0545

Note: To ensure your privacy, please do not submit your Tax Organizer or supporting documents via email.
The following are examples of supporting documentation:

- Forms W-2 for wages, salaries, tips, and gambling winnings.
- All Forms 1099 for interest, dividends, retirement, miscellaneous income, social security, state or local refunds, etc.
- Brokerage statements showing investment transactions for stocks, bonds, options, etc.
- Schedule K-1 from partnerships, S-corporations, estates and trusts.
- Statements supporting educational expenses, deductions or distributions, including any Forms 1098-T, 1098-E, or 1099-Q.
- All Forms 1095-A, 1095-B, and/or 1095-C related to health care coverage for the Premium Tax Credit.
- Statements supporting deductions for mortgage interest, taxes, and charitable contributions, including any Form 1098-C.
- Copies of closing statements regarding the sale or purchase of real property.
- Any tax notices sent to you by the IRS or other taxing authority.
- A copy of your income tax return from last year, if not prepared by Anderson.

FEE SCHEDULE FOR TAX RETURNS PREPARED IN 2023

Tax returns are billed by the hour for their preparation and review. Billable rates are:

- Tax Preparer $275/hour
- Tax Reviewer $475/hour

The minimum fee for a tax return is $900. Starting in 2023, you must be a Tax Advantage Program client or on an annual flat rate fee to have the Anderson tax department prepare your return(s). Since our preparation fees are based upon the amount of time required to prepare your tax return, your fee may exceed the minimums. This does not apply to clients who have established flat rates for tax preparation.

Anderson prepares tax returns on a first-in, first-out basis. That is, they are prepared in the order they are received. We do work with affiliated CPA firms to complete returns and reviews, so if you are facing an urgent timeline, we may be able to expedite return preparation and review through an affiliate.

Flat Rate and Tax Advantage clients will be able to submit their tax organizers starting January 14th.

In order to make the filing deadline for your 2022 income tax return, your completed organizer and backup documents should be in our office no later than 45 days before the deadline for your tax return to avoid any expedite fees (please review Client Statement for more details). Any information received after that date may require an extension to be filed for your return. Also, based on the complexity of your return, an extension may still need to be filed. Anderson will file your extension when necessary. You are responsible for paying any tax due to the IRS by April 15, 2023 in order to avoid certain late penalties and interest even if an extension has been or will be filed.

Your Client Tax Coordinator is available to assist should you have any questions regarding the Tax Organizer, uploading information to Box, or the preparation process.

Thank you for choosing Anderson for your asset protection, tax, and estate planning needs.

Sincerely,
Anderson Advisors Tax Team

The IRS does not send out unsolicited e-mails nor make unsolicited phone calls requesting or demanding personal information or immediate payment. Such authentic looking e-mails are called "phishing" emails and responding may expose you to identity theft. If you receive such emails, forward a copy to the IRS at phishing@irs.gov. Please do not respond to the email. You may also contact our office regarding any written or electronic correspondence or phone calls that you receive from the IRS.

2022
Tax Organizer for Individual Tax Returns 1040 Returns

ANDERSON
LEGAL, BUSINESS & TAX ADVISORS

Nevada
3225 McLeod Drive
Las Vegas, NV 89121
Fax: 702.664.0545

Washington
732 Broadway, Suite 201
Tacoma, WA 98402
Fax: 253.238.0003

Wyoming
1718 Capitol Avenue
Cheyenne, WY, 82001

800.706.4741
www.AndersonAdvisors.com

Use this Organizer for Individual (or Married Filing Joint) Returns

IMPORTANT

We are not able to complete your tax return until we have received the completed Tax Organizer and all required documentation, including but not limited to the Client Statement, payment information, corporate information, and ownership information.

Anderson Business Advisors
3225 McLeod Drive, Suite 100
Las Vegas, NV 89121

Toll Free: 800.706.4741
Local: 702.214.1100
Fax: 702.664.0547

E-Mail: organizers@andersonadvisors.com
Secure Online Upload Page: https://andersonadvisors.com/upload-documents/

FAX COVER PAGE

Attention: Tax Preparation Department

To: Anderson Business Advisors: 702.664.0545

Attention:

From:

Date:

Total Number of Pages: (including cover page)

THIS FAX INCLUDES THE FOLLOWING (Check all that apply)

☐ Client Statement
☐ Organizer for (Name:)
☐ Supporting Documents
☐ Other

You may also upload all documents securely online at:
https://andersonadvisors.com/upload-documents/

CLIENT STATEMENT

Anderson Business Advisors' Tax Department will start accepting Tax Organizers to prepare 2022 tax returns starting January 14th, 2023. Please complete the Tax Organizer to the best of your ability.

Clients with a Tax Advantage Program will be able to submit their tax organizers starting Jan 14th, non Tax Advantage Program clients may start submitting their organizers after Feb 1st.

Tax returns are prepared in the order received. Any Tax Organizers submitted within 45 days prior to the deadline may need to file an extension (if possible) OR require an expedite fee of $300.

Anderson Business Advisors reserves the right to complete work internally and through affiliated CPA firms such as H&CO, LLP as well as other qualified professionals in order to timely complete tax preparation and review services.

If your Tax Organizer and documents are received within 45 days prior to the tax deadline, we can not guarantee the return will be timely filed. This may result in the need to file an extension.

All tax liabilities are still due and payable by the original filing deadline to avoid underpayment penalties and interest. An extension only extends your time to file your return, not pay your taxes.

The scope of work in connection with the preparation of your ("the Client") federal and state tax returns is intended to be in compliance with the requirements issued by the various taxing authorities. Because tax laws are not always clear, honest differences of opinion may arise between our interpretation of laws and that of the various taxing authorities. We will assist you in resolving these differences in your favor whenever possible.

You and/or your duly appointed representative agree not to hold Anderson Business Advisors ("Anderson"), its representative, or its affiliated firms liable for interpretations made with regard to any of the information supplied by Client and used in the preparation of the tax returns.

Unless compelled to do so by law, Anderson does not disclose any irregularities or provide statements as to the validity of the information supplied by Client to any taxing authority.

All tax returns are subject to review and acceptance by the various taxing authorities. In the event of an examination by the IRS or other taxing authority, contact Anderson. We can respond or represent your position to the taxing authority; however, there may be a fee for this service. You may appeal any adjustments proposed by a taxing authority.

Please review your completed tax returns carefully. As preparers, we have a responsibility both to the various taxing authorities with whom we file tax returns as well as to our Clients. You remain liable for the contents of your tax returns prepared by Anderson from the data you provide.

All tax return preparation fees must be paid before the tax return can be electronically submitted to the taxing authority. Once payment is received and the proper forms are signed authorizing Anderson to electronically file the tax return, Anderson will then electronically file the tax return.

By signing this document I acknowledge this statement and the dates below.

Signature:

Name on Credit Card:

Last 4 digits of Credit Card being used (if Tax Package is not used):

If you wish to use a credit card that is not on file with Anderson, please contact your Client Tax Coordinator.

By submitting this form, you are authorizing Anderson Business Advisors to send you an invoice electronically upon completion (via email or Box.com) and to charge the credit card provided above five (5) days after the invoice has been submitted to you.

Anderson Business Advisors
3225 McLeod Drive
Las Vegas, NV 89121

Dear Valued Client:

This letter is to confirm and specify the terms of our engagement with you and to clarify the nature and extent of the services we will provide. In order to ensure an understanding of our mutual responsibilities, we ask all clients for whom returns are prepared to confirm the following arrangements.

We will prepare your 2022 federal and requested state income tax returns from information that you furnish us. We do not audit or otherwise verify the data you submit, although it may be necessary to ask you for clarification of some of the information. We will furnish you with questionnaires and/or worksheets to guide you in gathering the necessary information. Your use of such forms assists in keeping pertinent information from being overlooked.

It is your responsibility to provide all the information required for the preparation of complete and accurate returns. You should retain all the documents, canceled checks, and other data that form the basis of income and deductions. These may be necessary to prove the accuracy and completeness of the returns to a taxing authority. You have the final responsibility for the income tax returns and, therefore, you should review them carefully before you sign them.

Our work in connection with the preparation of your income tax returns does not include any procedures designed to discover defalcations or other irregularities, should any exist. We will render such accounting and bookkeeping assistance as determined to be necessary for preparation of the income tax returns.

We will use professional judgment in resolving questions where the tax law is unclear, or where there may be conflicts between the taxing authorities' interpretations of the law and other supportable positions. Unless otherwise instructed by you, we will resolve such questions in your favor whenever possible.

The law provides various penalties that may be imposed when taxpayers understate their tax liability. If you would like information on the amount or the circumstances of these penalties, please contact us. Your returns may be selected for review by the taxing authorities. Any proposed adjustments by the examining agent are subject to certain rights of appeal. In the event of such government tax examination, we will be available upon request to represent you and will render additional invoices for the time and expenses incurred.

Our fee for these services will be based upon the amount of time required at standard billing rates plus out-of-pocket expenses. All invoices are due and payable upon presentation.

If the foregoing fairly sets forth your understanding, please sign the enclosed copy of this letter in the space indicated and return it to our office. However, if there are other tax returns you expect us to prepare, such as gift and/or property, please inform us by noting so just below your signature at the end of the returned copy of this letter.

We want to express our appreciation for this opportunity to work with you.

Sincerely,

Anderson Business Advisors Tax Team

Accepted By:

Date:

Additional Returns (if applicable):

CONSENT FORM FOR INDIVIDUAL TAX PREPARATION VIA OUR INTERNATIONAL SUBSIDIARIES

To provide you with the best service and value possible, Anderson and its affilated CPA firms including the global firm, H&CO, LLP, continuously evaluate opportunities to streamline the preparation of your return. Some services that we provide to you may be performed by H&CO, LLP employees outside the United States. In order for Anderson, H&CO, LLP and our international subsidiaries to provide these services, we may need to disclose certain tax return information to them in order to complete your tax preparation and review services.

Your privacy is important to us. The tax return information is disclosed and protected through data protection safeguards as defined and required by the IRS which are maintained by both the Service Provider, Anderson, and H&CO, LLP. The IRS generally requires consent to disclose any information to persons located outside of the United States and requires that the below language be included in any consent form of this type.

Federal law requires this consent form be provided to you. Unless authorized by law, we cannot disclose your tax return information to third parties for purposes other than the preparation and filing of your tax return and, in certain limited circumstances, for purposes involving tax return preparation without your consent. If you consent to the disclosure of your tax return information, Federal law may not protect your tax return information from further use or distribution.

You are not required to complete this form. Because our ability to disclose your tax return information to another tax return preparer affects the tax return preparation services that we provide to you and their cost, we may decline to provide you with tax preparation services or change the terms (including the cost) of the tax preparation services that we provide to you if you do not sign this form. If you agree to the disclosure of your tax return information, your consent is valid for the amount of time that you specify. If you do not specify the duration of your consent, your consent is valid for one year from the date of signature.

This consent to disclose may result in your tax return information being disclosed to a tax return preparer located outside the United States, including your personally identifiable information such as your Social Security Number ("SSN"). Both the tax return preparer in the United States that will disclose your SSN and the tax return preparer located outside the United States that will receive your SSN maintain an adequate data protection safeguard (as required by the regulations under 26 U.S.C. Section 7216) to protect privacy and prevent unauthorized access of tax return information. If you consent to the disclosure of your tax return information, Federal agencies may not be able to enforce U.S. laws that protect the privacy of your tax return information against a tax return preparer located outside of the U.S. to which the information is disclosed.

If you believe your tax return information has been disclosed or used improperly in a manner unauthorized by law or without your permission, you may contact the Treasury Inspector General for Tax Administration (TIGTA) by telephone at 1-800-366-4484, or by e-mail at complaints@tigta.treas.gov.

If you agree to allow Anderson and its affiliated CPA firm, H&CO, LLP (U.S. based firm), to disclose your tax return information, including your SSN, to H&CO, LLP employees outside the United States and H&CO, LLP subsidiaries for purposes of providing assistance in the preparation of your 2022 individual income tax return(s), please check the box below, provide the information requested, and sign and date your consent to the disclosure of your tax return information.

I give my consent to get my personal return completed as rapidly and efficiently as possible I authorize Anderson, its affiliates and H&CO, LLP to disclose to H&CO, LLP employees outside the United States as well as H&CO, LLP subsidiaries to assist in the preparation of my 2022 individual income tax return(s).

I DO NOT give my consent to get my personal return completed as rapidly and efficiently as possible I request that personnel residing solely in the United States work on my personal tax return and acknowledge that this may cause a delay in the completion of my return.

Taxpayer Signature ____________ Date ____________

Spouse Signature ____________ Date ____________

OUR PRIVACY POLICY

Certified Public Accountants (CPAs), like all providers of personal financial services, are now required by law to inform their clients of their policies regarding privacy of client information. CPAs have been and continue to be bound by professional standards of confidentiality that are even more stringent than those required by law. Therefore, we have always protected your right to privacy.

TYPES OF NONPUBLIC PERSONAL INFORMATION WE COLLECT

We collect nonpublic personal information about you that is either provided to us by you or obtained by us with your authorization.

PARTIES TO WHOM WE DISCLOSE INFORMATION

For current and former clients, we do not disclose any nonpublic personal information obtained in the course of our practice except as required or permitted by law. Permitted disclosures include, for instance, providing information to our employees, our affiliated CPA firms we utlize to assist in the completion and/or review of tax returns and, in limited circumstances, to unrelated third parties who need to know that information to assist us in providing services to you. In all such situations, we stress the confidential nature of information being shared.

PROTECTING THE CONFIDENTIALITY AND SECURITY OF CURRENT AND FORMER CLIENTS' INFORMATION

We retain records relating to professional services that we provide so that we are better able to assist you with your professional needs and, in some cases, to comply with professional guidelines. In order to guard your nonpublic personal information, we maintain physical, electronic, and procedural safeguards that comply with our professional standards.

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Please call if you have any questions, because your privacy, our professional ethics, and the ability to provide you with quality financial services are very important to us.

Questions (Page 1 of 3)

The following questions pertain to the 2022 tax year. For any question answered Yes, include supporting detail or documents.

Personal Information

	Yes	No
Did your marital status change?	☐	☐
Are you married?	☐	☐
If Yes, do you and your spouse want to file separate returns?	☐	☐
If No, are you in a domestic partnership, civil union, or other state-defined relationship?	☐	☐
Can you or your spouse be claimed as a dependent by another taxpayer?	☐	☐
Did you or your spouse serve in the military or were you or your spouse on active duty?	☐	☐
Were you or your spouse notified by the IRS or other taxing authority of any changes in prior year returns?	☐	☐

Dependents:

	Yes	No
Were there any changes in dependents from the prior year? *Note: Include non-child dependents for whom you provided more than half the support.*	☐	☐
Did you or your spouse pay for child care while you or your spouse worked or looked for work?	☐	☐
Do you have any children age 18, or student children aged 19 to 23, who did not provide more than half of their cost of support with earned income and that have unearned income of more than $1,100?	☐	☐

Healthcare:

	Yes	No
Did you have healthcare coverage (health insurance, including Medicare, Medicaid, CHIP, and TRICARE) for you, your spouse, and any dependents for the entire year? If Yes, include all Forms 1095-A, 1095-B, and 1095-C. If you did not receive Forms 1095-A, 1095-B, or 1095-C, attach information detailing each month you, your spouse, and your dependents had coverage.	☐	☐

Education:

	Yes	No
Did you or your spouse pay any student loan interest?	☐	☐
Did you or your spouse withdraw any amounts from your IRA to pay for higher education expenses incurred by you, your spouse, your children, or grandchildren?	☐	☐
Did you or your spouse withdraw any amounts from a Coverdell Education Savings Account or Qualified Education Program (Section 529) plan? If Yes, include all Forms 1099-Q.	☐	☐
Did you, your spouse, or your dependents incur any post-secondary education expenses, such as tuition?	☐	☐

Questions (Page 2 of 3)

Deductions and Credits:	Yes	No
Did you or your spouse contribute property (other than cash) with a fair market value of more than $5,000 to a charitable organization?	☐	☐
If Yes, provide the appraisal of property contributed. An appraisal is not required for contributions of publicly traded securities or contributions of non-publicly traded stock of $10,000 or less.		
Did you or your spouse incur any casualty or theft losses?	☐	☐
Did you or your spouse make any large purchases, such as motor vehicles and boats?	☐	☐
Did you or your spouse incur any casualty or loss attributable to a federally declared disaster?	☐	☐
Did you or your spouse purchase a new alternative technology vehicle, including a qualified plug-in electric drive motor vehicle?	☐	☐
Did you or your spouse install any alternative energy equipment in your residence such as solar water heaters, solar electricity equipment (photovoltaic), or fuel cells?	☐	☐
Did you or your spouse install any alternative energy improvement or energy property in your residence such as exterior doors or windows, insulation, heat pumps, furnaces, central air conditioners, or water heaters?	☐	☐

Investments:

Did you or your spouse have any debts canceled, forgiven, or refinanced?	☐	☐
Did you or your spouse start or purchase a business, rental property, or farm, or acquire any new interest in any partnership or S corporation?	☐	☐
Did you or your spouse sell an existing business, rental property, farm, or any existing interest in a partnership or S-corporation?	☐	☐
Did you or your spouse sell, exchange, or purchase any real estate?	☐	☐
If Yes, include closing statements.		
Did you or your spouse receive grants of stock options from your employer, exercise any stock options granted to you or your spouse, or dispose of any stock acquired under a qualified employee stock purchase plan?	☐	☐
Did you or your spouse engage in any put or call transactions?	☐	☐
If Yes, provide the transaction details.		
Did you or your spouse close any open short sales?	☐	☐
Did you or your spouse sell any securities not reported on Form 1099-B?	☐	☐

Retirement or Severance:

Did you or your spouse contribute to a Roth IRA or convert an existing IRA into a Roth IRA?	☐	☐
Did you or your spouse roll into a Roth IRA any distributions from a retirement plan, an annuity plan, tax shelter annuity, or deferred compensation plan?	☐	☐
Did you or your spouse turn age 70 ½ and have money in an IRA or other retirement account without taking any distribution?	☐	☐
Did you or your spouse retire or change jobs?	☐	☐

Personal Residence:

Did your address change?	☐	☐
If Yes, provide the new address.		
If Yes, did you move to a different home because of a change in the location of your job?	☐	☐
Did you or your spouse claim a homebuyer credit for a home purchased in 2008?	☐	☐
Are you claiming a deduction for mortgage interest paid to a financial institution and someone else received the Form 1098?	☐	☐

Questions (Page 3 of 3)

Sale of Your Home:

	Yes	No
Did you sell your home?	☐	☐
Did you receive Form 1099-S?	☐	☐
If Yes, include Form 1099-S.		
Did you or your spouse own and occupy the home as your principal residence for at least two years of the five year period prior to the sale?	☐	☐
Did you or your spouse ever rent out the property?	☐	☐
Did you or your spouse ever use any portion of the home for business purposes?	☐	☐
Have you or your spouse sold a principal residence within the last two years?	☐	☐

At the time of the sale, the residence was owned by the: Taxpayer ☐ Spouse ☐ Both ☐

Gifts:

	Yes	No
Did you or your spouse make any gifts, including birthday, holiday, anniversary, graduation, education savings, etc., with a total (aggregate) value in excess of $15,000 to any individual?	☐	☐

Foreign Matters:

	Yes	No
Did you or your spouse perform any work outside of the U.S. or pay any foreign taxes?	☐	☐
Were you or your spouse grantor or transferor for a foreign trust, have any interest in or a signature authority over a bank account, securities account or other financial account in a foreign country?	☐	☐
Did you or your spouse create or transfer money or property to a foreign trust?	☐	☐
Did you or your spouse own any foreign financial assets?	☐	☐
If Yes, are the foreign financial assets valued at over $10,000?	☐	☐

Miscellaneous:

	Yes	No
Did you or your spouse sell, acquire, or exchange Bitcoin or other virtual currencies or engage in any sales or exchanges denominated in Bitcoin or other virtual currencies?	☐	☐
Did you or your spouse receive an economic impact payment?	☐	☐
If Yes, enter the amount of any economic impact payment received.		
If Yes, did you or your spouse repay any of the economic impact payment received?	☐	☐
If Yes, enter the amount of the economic impact payment repaid.		
Did you or your spouse receive any advanced child tax credit payments?	☐	☐
If Yes, attach all IRS Letters 6419 and enter the amount of payments received.		
If self-employed, were you unable to work due to contracting COVID-19, being in quarantine or isolation due to COVID-19, caring for an individual who contracted COVID-19 or was in quarantine due to COVID-19, or due to caring for a son or daughter because the child's school or childcare provider was closed or unavailable due to COVID-19 precautions?	☐	☐
Did you or your spouse repay a 2021 coronavirus-related retirement distribution?	☐	☐
If Yes, what was the amount repaid? Date of repayment		
Did you or your spouse take out a Payroll Protection Program loan?	☐	☐
If Yes, enter the date and total amount of the Payroll Protection Program loan(s) disbursed.		
Date (Mo/Da/Yr) Amount		
If Yes, did you or your spouse have any eligible expenses reported for the buisiness?	☐	☐
If Yes, are these amounts included in the expenses reported for the business?		
If Yes, did you or your spouse receive loan forgiveness or are you or your spouse seeeking forgiveness?	☐	☐
If No, enter the date loan forgiveness was denied or that you or your spouse decided not to seek forgiveness. Date(Mo/Da/Yr)		
If No, enter the amount of the loan for whick forgiveness was denied or the amount of the loan for which you or your spouse decided not to seek forgiveness. Amount		

Personal Information

2022

Taxpayer:

First Name and Initial | Last Name | Social Security Number

Occupation | Date of Birth (Mo/Da/Yr) | Date ofDeath (Mo/Da/Yr)

Drivers License or State-Issued ID Number | Issue Date (Mo/Da/Yr) | Expiration Date (Mo/Da/Yr) | State

☐ Drivers License ☐ State-Issued ID ☐ No Identification

Spouse:

First Name and Initial | Last Name | Social Security Number

Occupation | Date of Birth (Mo/Da/Yr) | Date ofDeath (Mo/Da/Yr)

Drivers License or State-Issued ID Number | Issue Date (Mo/Da/Yr) | Expiration Date (Mo/Da/Yr) | State

☐ Drivers License ☐ State-Issued ID ☐ No Identification

Contact Information:

Street address | Apartment Number

City | State | ZIP or Postal Code

Foreign Province or Country

Foreign Country

Taxpayer Daytime/Work Phone | Taxpayer Evening/Home Phone | Taxpayer Foreign Phone

Taxpayer Cell Phone | Taxpayer Fax Number

Spouse Daytime/Work Phone | Spouse Evening/Home Phone | Spouse Foreign Phone

Spouse Cell Phone | Spouse Fax Number

Taxpayer Email Address

Spouse Email Address

Preferred Method of Contact

	Yes	No
May the IRS or other taxing authority discuss the return with the preparer?	☐	☐
Is the taxpayer claimed as a dependent on someone else's tax return?	☐	☐

	Taxpayer Yes	Taxpayer No	Spouse Yes	Spouse No
Are you considered legally blind per IRS regulations?	☐	☐	☐	☐
Do you want to contribute to the Presidential Election Campaign Fund?	☐	☐	☐	☐
Are you a U.S. Citizen or Green Card holder?	☐	☐	☐	☐

Personal Identification Numbers:

Code - 1 - Issued by IRS 2- Issued by State or City

TS	State	City	Code	Pin

Tax Organizer Legend:

Throughout the tax organizer, you will find collumns with the heading "TSJ". Enter "T" for taxpayer, "S" for spouse or "J" for joint.

Dependents & Wages

2022

Dependent Information

	First name and Initial	Last Name	Social Security Number	Date of Birth (Mo/Da/Yr)	Date of Death (Mo/Da/Yr)	Relationship to Taxpayer
A						
B						
C						
D						
E						
F						
G						

Did your qualifying relative have more than $4,200 in gross income during the year? Yes ☐ No ☐

	Months Lived in Your Home	X if Disabled	Yes or No	Identity Protection PIN
A				
B				
C				
D				
E				
F				
G				

*If you received IRS Letter 6419 for Advance Child Tax Credit Payments and/or IRS Letter 6475 reporting the third Economic Impact Payment, please provide a copy of these letters to us along with your tax organizer..

Provide the name of any dependent who is not a U.S. citizen or Green Card holder.

Provide the name of any person living with you who is claimed as a dependent on someone else's tax return.

List the years that a release of claim to exemption is given for a dependent child not living with you.

Wages and Salaries:

Include all copies of your current year Forms W-2

Note: Use this section to report any wages and or salaries for which no Form W-2 was recieved.

TS	Employer's Name	Taxable Wages	Taxable Withheld

Direct Deposit and Withdrawal

2022

Direct Deposit and Electronic Funds Withdrawal Account Information:

The IRS and certain states allow refunds to be deposited to and balances due to be paid directly from your financial institution. If you would like to receive your refund or pay a balance due electronically, complete the following information.

	Yes	No
Would you like any refunds owed to you directly deposited?	☐	☐
Would you like to pay any amount due on your federal return using electronic withdrawal?	☐	☐
If Yes, what amount would you like withdrawn, if not the entire balance due? ______		
If Yes, when should the withdrawal occur, if other than the due date of the return? ______ (Mo/Da/Yr)		
Would you like to pay any amount due on your state return(s) using electronic withdrawal?	☐	☐
If Yes, what amount would you like withdrawn, if not the entire balance due? ______		
If Yes, when should the withdrawal occur, if other than the due date of the return? ______ (Mo/Da/Yr)		
The IRS and some states allow estimated payments to be electronically withdrawn on the due dates of the estimated payments		
Would you like to pay any estimated payments due for your federal return using electronic withdrawal?	☐	☐
Would you like to pay any estimated payments due for your state return(s) using electronically withdrawal, if available?	☐	☐

Name of bank or financial institution ______

Routing Transit Number (RTN) ______

Account Number ______

Type of Account: ☐ **Checking** ☐ **Traditional Savings** ☐ **IRA Savings** ☐ **myRA** ☐ **Archer MSA Savings** ☐ **Coverdell Ed. Savings** ☐ **HSA Savings**

Is this a business account? ☐ **Yes** ☐ **No**

Account owner ☐ **Taxpayer** ☐ **Spouse** ☐ **Joint**

I confirm that the bank account information and the direct deposit/electronic withdrawal options selected above are correct. ☐

Interest and Dividend Income Information

2022

Include all Forms 1099-INT or other documents for interest received
(List all items sold during the year on Form 7.)

Interest Income:

Special Interest Code: 2 - Seller Financed Mortgage Interest 3 - Early Withdrawal Penalty 4 - Nominee Interest
1 - Qualified Educational Series EE Bonds 5 - Accrued Interest 6 - Original Issue Discount Adjustment 7 - Amortizable Bond Premium Adjustment

	TSJ	Source	Interest Income	U.S. Bonds and Obligations	Code	Special Interest
A						
B						
C						
D						
E						

	Social Security of Home Buyer	Address of Individual from Whom Mortgage Interest Was Received	Code	Tax Exempt Interest
A				
B				
C				
D				
E				

	Federal Withholding	State Withholding	Investment Expenses
A			
B			
C			
D			
E			

Tax-Exempt Interest Code:
1 - 1099-DIV
2 - Private Activity Bonds
3 - Both

Dividend Income:

Include all Forms 1099-DIV or other documents for dividends received
(List all items sold during the year on Form 7.)

TSJ	Source	Box 1a Total Ordinary Dividends	Box 1b Qualified Dividends	U.S. Interest Amount or Percent in Box 1a	Code	Tax-Exempt Interest

Tax-Exempt Interest Code:
1 - 1099-DIV
2 - Private Activity Bonds
3 - Both

Box 2a Total Capital Gain Distribution	Box 2b Unrecapptured Section 1250 Gain	Box 2c Section 1202 Gain	Box 2d Collectibles (28%) Gain	Box 3 Non Taxable Distributions

Box 4 Federal Withholding	Box 5 Investment Expenses	State Withholding

Business Income and Cost of Goods Sold

2022

Name of Business: .... ______

Principal Business or Profession:................ ______

TSJ.. ____
Employer ID number................................ ______
Street address..................................... ______
City, state, ZIP or postal code, and country .... ______
Method of inventory................................ ______
Method of accounting .... ______

Business Questions for 2022:

	Yes	No
Did you dispose of this business?........................	☐	☐
If Yes, what was the disposition date?.................. (Mo/Da/Yr) ______		
Was there a change in determining quantities, costs or valuations between opening and closing inventory?..........	☐	☐
Were you involved in the operations of this business on a regular, continuous and substantial basis?	☐	☐
Have you prepared or will you prepare all required Forms 1099?..........	☐	☐

	2022 Amount
Health insurance premiums paid for yourself and your dependents..........	

Income:

Payment card and third party transactions: Include all Forms 1099-K

Description	2022 Amount

Miscellaneous income: Include all Forms 1099-MISC

Other Income:

Other gross receipts or sales..........	
Less returns and allowances..........	

Cost of Goods Sold:

	2022 Amount
Beginning inventory	
Purchases less cost of items withdrawn for personal use	
Cost of labor (do not include amounts paid to yourself)	
Materials and supplies	

Other costs of goods sold:

Description	2022 Amount

Ending inventory..........	

Business Expenses

2022

Name of Business: .... ____________

Principal Business or Profession: .... ____________

Business Expenses: Enter all expenses at 100 percent

If these expenses are to be divided between two or more businesses, please enter the percentage to apply to this business .... ______ %

	2022 Amount
Advertising	
Car and truck expenses	
Parking fees and tolls	
Commissions and fees	
Contract labor	
Employee benefit programs and health insurance (other than pension and profit-sharing plans)	
Insurance (other than health)	
Interest - mortgage (paid to banks, etc.)	
Interest - other	
Legal and professional fees	
Office expense	
Pension and profit-sharing plans	
Rent or lease - vehicles, machinery and equipment	
Rent or lease - other business property	
Repairs and maintenance	
Supplies (not included in Cost of Goods Sold)	
Taxes and licenses	
Travel	
Meals	
Entertainment (deductible only on some state returns)	
Utilities	
Wages	
Dependent care benefits	

Other Expenses:

Description	2022 Amount

Vehicle:

If these vehicle expenses are to be divided between two or more businesses, please enter the percentage to apply to this business ________ %

Description of vehicle ________

Date vehicle was placed in service (Mo/Da/Yr) ________

Do you (or your spouse) have another vehicle available for personal purposes? ☐ Yes ☐ No

Was your vehicle available for personal use during off-duty hours? ☐ Yes ☐ No

				2022
Total miles	01/01/2022-06/30/2022		07/01/2022-12/31/2022	
Total business miles	01/01/2022-06/30/2022		07/01/2022-12/31/2022	
Total commuting miles for the year				
Gasoline and oil				
Repairs				
Insurance				
Interest				
Taxes				
Value of employer provided vehicle				
Temporary vehicle rentals				
Fair market value of leased vehicle				
Vehicle leases				

Other Vehicle Expenses:

Description	2022 Amount

Sales of Stocks, Securities, Capital Assets & Installment Sales

Gains or Losses from Sales of Stocks, Securities and Other Capital Assets:

Include all Forms 1099-A, 1099-B, 1099-S and copies of mutual fund statements for the year

Please complete the following table for sales without supporting documentation, otherwise include copies of original supporting documents.

	TSJ	Kind of Property and Description	Date Acquired (Mo/Da/Yr)	Date Sold (Mo/Da/Yr)	Gross Sales Price (Less Commissions)	Cost or Other Basis
A						
B						
C						
D						
E						
F						
G						
H						

Installment Sales: Do not include interest received in principal amount

TSJ	Property Description	Date Sold (Mo/Da/Yr)	2022 Principal Received

Retirement Plan and IRA Information

2022

Individual Retirement Account (IRA): Enter all expenses at 100 percent

TS……………………………………………………………..

IRA Questions for 2022	Yes	No
Are you covered by an employer's retirement plan?……	☐	☐
If no, is your spouse covered by an employer's retirement plan?……	☐	☐
Do you want to limit your IRA contribution to the maximum amount deductible on your tax return?……	☐	☐
If no, do you want to contribute the maximum allowable amount to your IRA even though you may not qualify for an IRA deduction?……	☐	☐
Did you have any transactions with any IRA during the year?……	☐	☐

If Yes, explain ______________________________

Total amount converted to Roth IRAs
IRA Values, Rollovers, and Distributions:

Total value of all traditional IRAs on December 31, 2022…… ________

Note: This information or Form 5498 is required if you received a distribution during the year.
Contributions:

IRA:
Contributions in 2022 for the 2022 tax return…… ________
Contributions in 2023 for the 2022 tax return…… ________
Amount for 2022 you choose to be treated as nondeductible Roth IRA:…… ________

Contributions made for the 2022 tax year…… ________

Distributions: Include all Forms 1099-R and any nontaxable distribution details

Name of Payer	2022 Gross Distributions	Taxable Amount	Federal Tax Withheld	State Tax Withheld	Is this a roll over?

	Tax Payer Yes	Tax Payer No	Spouse Yes	Spouse No
Have you established a self-employed retirement or SIMPLE plan with deductible contributions?……	☐	☐	☐	☐
Do you want to contribute the maximum amount allowed?……	☐	☐	☐	☐

Contributions to:	Tax Payer 2022 Amount	Spouse 2022 Amount
Simplified employee pension plan……		
Defined benefit plan……		
Defined contribution plan……		
SIMPLE plan……		

Rental and Royalty Income

2022

Location of Property: ______________________________

TS.............................. ____

Type of property.......... ______________________________

	Yes	No
Have you prepared or will you prepare all required Forms 1099?	☐	☐

	2022 Amount
Ownership percentage if not 100%	
How many days was this property rented at fair market value?	
How many days was this property used personally (including use by family members)?	

Income:

	2022 Amount
Rents received	
Royalties received	

Other Income:

Description	2022 Amount

Rental and Royalty Expenses

2022

Location of Property: ______________________________

Expenses:

	2022 Amount
Advertising	
Auto and travel	
Cleaning and maintenance	
Commissions	
Insurance	
Legal and other professional fees	
Management fees	
Mortgage interest paid to banks, etc.	
Mortgage interest paid to individuals	
Other interest	
Repairs	
Supplies	
Taxes	
Utilities	

Other Expenses:

Description	2022 Amount

Miscellaneous Income, Adjustments and Alimony

2022

Include Forms: W-2G, 1099-MISC, 1099-RRB, 1099-SSA, 1099-SA, 1099-LTC and 1099-G

Miscellaneous Income and Adjustments:

	TSJ_____ 2022 Amount	TSJ_____ 2022 Amount
Unemployment compensation received		
Social security benefits received		
Medicare premiums withheld		
Tier 1 railroad retirement benefits received		
Other federal withholding		
Other state withholding		

State and Local Income Tax Refunds:

TSJ	State	City	Tax Year	Income Tax Refund State	Income Tax Refund Local

Other Income

TSJ	Nature and Source	2022 Amount

Alimony Paid or Received:

TSJ	Recipient's Name	Recipient's Social Security No.	Alimony Received	2022 Amount	Date of Original Divorce or Seperation	Date Divorce or Separation Agreement Modified

Itemized Deductions - Medical and Taxes

2022

Medical and Dental Expenses:

	TSJ	2022 Amount
Prescription medicines and drugs		
Total medical insurance premiums paid *		
Long-term care expenses		
Total insurance reimbursement		

	TSJ	01/01/2022-06/30/2022	07/01/2022-12/31/2022
Number of miles traveled for medical care			
Lodging			
Doctors, dentists, etc.			
Hospitals			
Lab fees			
Eyeglasses and contacts			

	2022 Amount
Taxpayer long-term care insurance premiums paid	
Spouse long-term care insurance premiums paid	

* Do not include Medicare premiums or premiums deducted in computing taxable wages reported on a W-2.

Medical and Dental Expenses:

TSJ	Description	2022 Amount

Taxes Paid: Include copies of your tax bills

	TSJ	2022 Amount
Personal property taxes paid (include vehicle taxes)		
General sales taxes paid on large purchases		

Itemize real estate taxes by state.

TSJ	Real Estate Taxes	2022 Amount

Other Paid Taxes

TSJ	Real Estate Taxes	2022 Amount

Itemized Deductions - Mortgage Interest and Points

2022

Mortgage Questions for 2022:

	Yes	No
Did you refinance your home? (If Yes, enclose the closing statement.)	☐	☐

If Yes, how many years is your new mortgage loan? ________________

Home Mortgage Interest Paid To Financial Institutions:

TSJ	Paid to	Did you recieve from 1098?		2022 Amount
		Yes	No	

Other Home Mortgage Interest Paid:

TSJ	Paid To		ID Number	2022 Amount
	Name	Address		

Deductible Points:

TSJ	Paid to	Did you recieve from 1098?		2022 Amount
		Yes	No	

Mortgage Insurance Premiums:

TSJ	2022 Amount

Investment Interest Expense:

Interest paid on money you borrowed that is allocable to property held for investment.

TSJ	Paid to	2022 Amount

Itemized Deductions - Contributions

2022

Cash Contributions

Include all Forms 1098-C or other documentation.

You cannot deduct a cash contribution, regardless of the amount, unless you keep as a record of the contribution a bank record (such as a canceled check, a bank copy of a canceled check, or a bank statement containing the name of the charity, the date, and the amount) or a written communication from the charity. The written communication must include the name of the charity, date of the contribution, and amount of the contribution. Clothes and household items donated must be in good, used condition or better in order to be deductible unless the item donated is worth more than $5,000 and you have the item's value appraised. Attach a copy of the appraisal. Include any vehicles donated to charity.

TSJ	Organization or Description of Contribution	2022 Amount

TSJ	Description		2022 Miles
	Number of miles traveled performing volunteer work for qualified charitable organizations	01/01/2022-06/30/2022	
		07/01/2022-12/31/2022	

Noncash Contributions Totaling $500 or Less: Include all documentation.

TSJ	Description of Donated Property	2022 Amount

Noncash Contributions Totaling More than $500:

TSJ.................................. ____________

Description of the donated property.................................. ____________

Donee organization name.............................. ____________

Donee organization address........................... ____________

Date the property was acquired by the taxpayer (Mo/Da/Yr) ____________

Date the property was donated (Mo/Da/Yr) ____________

Cost or basis of the donated property..	
Fair market value of the donated property..	

2022

Child/Dependent Care Expenses & Education Expenses

Child/Dependent Care Expenses:

General Information:

TSJ. . . . . ______

Were you or your spouse a full time student or disabled? . . . . ☐ Yes ☐ No
Did you pay an individual for services performed in your home? . . . . ☐ Yes ☐ No

Expenses incurred in 2021 but paid in 2022	
Employer-provided dependent care benefits that were forfeited in 2022	
2021 carryover used in grace period	

Child/Dependent Care Providers:

Provider 1:

Name	
Street address	
City, state, ZIP or postal code, and country Social security number OR	
Employer identification number	
Telephone number (California only)	

	2022 Amount
Expenses incurred and paid in 2022	
Expenses incurred and not paid in 2022	

Provider 2:

Name	
Street address	
City, state, ZIP or postal code, and country Social security number OR	
Employer identification number	
Telephone number (California only)	

	2022 Amount
Expenses incurred and paid in 2022	
Expenses incurred and not paid in 2022	

Qualifying Persons for Child/Dependent Care Expenses:

First Name and Initial	**Last** Name	Social Security Number	2022 Expenses incurred

Higher Education Expenses for Education Credits and/or Tuition Fees Deduction:

Qualified expenses are for post-secondary education tuition and related expenses; they do not include room or board. Include a detailed listing of the expenses.

Include copies of all Forms 1098-T

First Name and Initial	**Last** Name	Social Security Number	2022 Qualified Expenses

Itemized Deductions - Contributions

2022

Refund Application:

If you have an overpayment of 2022 taxes, do you want the excess:

Refunded ☐ Yes ☐ No
Applied to your 2023 estimated tax liability ☐ Yes ☐ No

Federal Estimated Tax Payments:

	Date Paid if Not Date Due (Mo/Da/Yr)	Amount Paid
2022 1st Quarter Estimate		
2022 2nd Quarter Estimate		
2022 3rd Quarter Estimate		
2022 4th Quarter Estimate		
2021 overpayment applied to 2022 estimate		

State and City Tax Payments

State and City Estimated Tax Payments:

TSJ___
State/City____________________

	Date Paid if Not Date Due (Mo/Da/Yr)	Amount Paid
2022 1st Quarter Estimate		
2022 2nd Quarter Estimate		
2022 3rd Quarter Estimate		
2022 4th Quarter Estimate		

If you have an overpayment of 2022 taxes, do you Want the excess applied to your 2023 estimated tax liability? ☐ Yes ☐ No

2021 overpayment applied to 2022 estimate	
Balance of prior year(s)' tax paid in 2022 plus amount paid with 2021 extensions	
Estimated tax payments for 2021 paid in 2022	

Additional Information

2022