

2022 Tax Organizer Personal Information

Personal Information

	Name	SSN	Has IP PIN	Date of birth
Taxpayer				
Spouse				
Name of person to whom all information should be addressed, if not the taxpayer				
Street address, city, state, and ZIP				
	Occupation	Daytime phone	Evening phone	Cell phone
Taxpayer				
Spouse				
Taxpayer email				
Spouse email				

Filing status at the end of 2022

- Single
 Married
 Widowed - If widowed and your spouse died in 2022, enter the date of death _____
 Married filing separately - If married but filing separately, did you live apart from your spouse for the last six months of 2022? _____

Yes No

- Are you or your spouse blind?
 Are you or your spouse disabled?
 Are you or your spouse a full-time student?
 Do you or your spouse want to designate \$3 to go to the Presidential Election Campaign Fund?
 At any time during 2022 did you:
 (a) receive (as a reward, award, or payment for property or services) a digital asset
 (b) sell, exchange, gift, or otherwise dispose of a digital asset (or a financial interest in a digital asset)

Identification Information

Taxpayer's type of photo ID

- Driver's license
 State-issued photo ID

Photo ID number _____

State photo ID was issued _____

Date photo ID was issued _____

Date photo ID expires _____

Spouse's type of photo ID

- Driver's license
 State-issued photo ID

Photo ID number _____

State photo ID was issued _____

Date photo ID was issued _____

Date photo ID expires _____

Account Information for Deposits and Withdrawals

Name of bank	Bank routing number	Bank account number	Type of account		Use this account for	
			Checking	Savings	Deposits	Withdrawals

Appointment Information

Your 2022 appointment is scheduled for _____

Dependent and Other Information

Name: _____

SSN: _____

Dependent Information

First and last name SSN	Has IP PIN	Relationship	Months in home	Date of birth	Disabled	Full- time student	Childcare Expenses

List dependents required to file a return _____

Estimates

	Federal		Resident State		Resident City	
	Date paid	Amount	Date paid	Amount	Date paid	Amount
Overpayment applied from 2021	_____	_____	_____	_____	_____	_____
First quarter	_____	_____	_____	_____	_____	_____
Second quarter	_____	_____	_____	_____	_____	_____
Third quarter	_____	_____	_____	_____	_____	_____
Fourth quarter	_____	_____	_____	_____	_____	_____
Additional payments	_____	_____	_____	_____	_____	_____

Child and Dependent Care

Name: _____

SSN: _____

Child Care Provider's Information

You or your spouse were a full-time student or disabled during 2022?

	2022	2021
Social Security Number or Employer ID Number _____	Amount paid _____	<div style="background-color: #cccccc; width: 100px; height: 20px;"></div>

Name _____

Street address _____

City _____ Phone _____

U.S. only State, ZIP _____

Foreign only Province/State, Country, Postal code _____

Check here if the care provider is your household employee (Schedule H)

	2022	2021
Social Security Number or Employer ID Number _____	Amount paid _____	<div style="background-color: #cccccc; width: 100px; height: 20px;"></div>

Name _____

Street address _____

City _____ Phone _____

U.S. only State, ZIP _____

Foreign only Province/State, Country, Postal code _____

Check here if the care provider is your household employee (Schedule H)

	2022	2021
Social Security Number or Employer ID Number _____	Amount paid _____	<div style="background-color: #cccccc; width: 100px; height: 20px;"></div>

Name _____

Street address _____

City _____ Phone _____

U.S. only State, ZIP _____

Foreign only Province/State, Country, Postal code _____

Check here if the care provider is your household employee (Schedule H)

Schedule E - Income or Loss from Rental Real Estate & Royalties

Name: _____

SSN: _____

General Property Information

TSJ _____
 Property description _____
 Address, city, state, ZIP _____

Select the property type

- Single family residence
 Vacation / short-term rental
 Land
 Self-rental
 Multi-family residence
 Commercial
 Royalties
 Other _____

Number of days property was rented _____ Number of days property was used for personal use _____

If the rental is a multi-dwelling unit and you occupied part of the unit, enter the percentage you occupied _____

- This property was placed in service during 2022. Yes No
 This property was disposed of during 2022. Payments of \$600 or more were paid to an individual, who is not your employee, for services provided for this rental.
 This property is your main home or second home. If "Yes," did you file Forms 1099 for the individuals?
 This property was owned as a qualified joint venture.

Income

	2022	2021		2022	2021
Rent Income	_____	_____	Royalties from oil, gas, mineral, copyright or patent	_____	_____

Expenses

	Rental unit expenses		Rental <u>and</u> homeowner expenses		
Advertising	_____	_____	_____	_____	If this Schedule E is for a multi-unit dwelling and you lived in one unit and rented out the other units, use the "Rental and homeowner expenses" column to show expenses that apply to the entire property. Use the "Rental unit expenses" column to show expenses that pertain ONLY to the rental portion of the property.
Auto & travel	_____	_____	_____	_____	
Cleaning & maintenance	_____	_____	_____	_____	
Commissions	_____	_____	_____	_____	
Insurance	_____	_____	_____	_____	
Legal & professional fees	_____	_____	_____	_____	
Management fees	_____	_____	_____	_____	
Mortgage interest	_____	_____	_____	_____	
Other interest	_____	_____	_____	_____	
Repairs	_____	_____	_____	_____	
Supplies	_____	_____	_____	_____	If the Schedule E is not for a multi-unit property in which you lived in one unit, complete just the "Rental unit expenses" column.
Taxes	_____	_____	_____	_____	
Utilities	_____	_____	_____	_____	
Depletion	_____	_____	_____	_____	
Other expenses (list)	_____	_____	_____	_____	
_____	_____	_____	_____	_____	
_____	_____	_____	_____	_____	
_____	_____	_____	_____	_____	
_____	_____	_____	_____	_____	
_____	_____	_____	_____	_____	
_____	_____	_____	_____	_____	

Schedule F - Profit or Loss from Farming

Name: _____

SSN: _____

General Information

TS _____ Principal product _____ Employer ID number _____

Accounting method, if not cash: Accrual

This farm was disposed of during 2022.

Yes No

Payments of \$600 or more were paid to an individual, who is not your employee, for services provided for this farm.

If "Yes," did you file Forms 1099 for the individuals?

You received a Paycheck Protection Program (PPP) loan for this business.

If "Yes," was any portion of the loan forgiven?

Income

	2022	2021		2022	2021
Sale of livestock / other items	_____	_____	Crop insurance proceeds:	_____	_____
Cost of items bought for resale	_____	_____	Amount received in 2022	_____	_____
Sale of products you raised	_____	_____	<input type="checkbox"/> You elect to defer to 2023		
Total cooperative distributions	_____	_____	Amount deferred from 2021	_____	_____
(Provide 1099-PATR)			Custom hire income	_____	_____
Total agricultural payments	_____	_____	Beginning inventory for accrual	_____	_____
Commodity Credit Corporation (CCC) loans:			Ending inventory for accrual	_____	_____
CCC loans reported	_____	_____	<input type="checkbox"/> You used unit-livestock-price or farm-price inventory method.		
CCC loans forfeited	_____	_____	Other income	_____	_____

Expenses

	2022	2021		2022	2021
Car & truck expenses	_____	_____	Repairs & maintenance	_____	_____
Chemicals	_____	_____	Seeds & plants purchased	_____	_____
Conservation expenses	_____	_____	Storage & warehousing	_____	_____
Custom hire (machine work)	_____	_____	Supplies purchased	_____	_____
Employee benefit programs	_____	_____	Taxes	_____	_____
Feed purchased	_____	_____	Utilities	_____	_____
Fertilizers & lime	_____	_____	Veterinary, breeding, & medicine	_____	_____
Freight & trucking	_____	_____	Family health coverage payments for taxpayer, spouse or dependents	_____	_____
Gasoline, fuel, & oil	_____	_____	Other expenses (list)	_____	_____
Insurance (other than health)	_____	_____		_____	_____
Interest - mortgage (paid to banks, etc.)	_____	_____		_____	_____
Interest - other	_____	_____		_____	_____
Non-W-2 labor hired	_____	_____		_____	_____
W-2 wages paid	_____	_____		_____	_____
Pension & profit-sharing plans	_____	_____		_____	_____
Rent - vehicles, machinery & equipment	_____	_____		_____	_____
Rent - other (land, animals, etc.)	_____	_____		_____	_____

Other Income and Adjustments

Name: _____

SSN: _____

Other Income

	2022 Taxpayer	2021 Taxpayer	2022 Spouse	2021 Spouse
Railroad Retirement Benefits (attach Forms 1099-RRB)	_____	_____	_____	_____
State income tax refund (attach Forms 1099-G)	_____	_____	_____	_____
Alimony received Divorce or separation date _____ Amount _____	_____	_____	_____	_____
Unemployment compensation (attach Forms 1099-G)	_____	_____	_____	_____
Unemployment compensation repaid in 2022	_____	_____	_____	_____
Gambling winnings (attach Forms W2-G)	_____	_____	_____	_____
Alaska Permanent Fund	_____	_____	_____	_____
Jury duty pay	_____	_____	_____	_____
ABLE distributions	_____	_____	_____	_____
Scholarships or grants not reported on Form W-2	_____	_____	_____	_____
Other income: _____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

Adjustments

	2022 Taxpayer	2021 Taxpayer	2022 Spouse	2021 Spouse
Educator expenses (If you are an educator, enter the amount you paid for classroom supplies)	_____	_____	_____	_____
Payments made for Self-Employed Health Insurance for you, your spouse, or dependents	_____	_____	_____	_____
Alimony paid Name _____ SSN _____ Divorce or separation date _____	_____	_____	_____	_____
Name _____ SSN _____ Divorce or separation date _____	_____	_____	_____	_____
Contributions made to a Self-Employed Pension plan (SEP), SIMPLE, or Solo 401K	_____	_____	_____	_____
Contributions made to an Individual Retirement Account (IRA)	_____	_____	_____	_____
Interest paid on a student loan	_____	_____	_____	_____
Other adjustments: _____	_____	_____	_____	_____

Education Credits

Name: _____

SSN: _____

Provide all Form(s) 1098-T

Student's first and last name: _____ SSN: _____

Has the Hope Scholarship Credit or American Opportunity Credit been claimed for this student for a total of four times in any prior years? Yes

Was the student enrolled at least half-time for at least one academic period that began in 2022 at an eligible education institution in a program leading toward a post-secondary degree, certificate, or other recognized post-secondary educational credential?

Did the student complete the first four years of post-secondary education before 2022?

Was the student convicted, before the end of 2022, of a felony for possession or distribution of a controlled substance?

Is the student pursuing a degree?

Number of years the American Opportunity Credit has been claimed for this student _____

Total qualified education expenses (including the cost of books, supplies, and equipment) that were REQUIRED to be paid directly to the educational institution 2022 2021

ADDITIONAL qualified education expenses that were NOT required to be paid directly to the educational institution

Tax-free education assistance received in 2022 allocable to the academic period

Tax-free education assistance received in 2023 (and before 2022 return is filed) allocable to the academic period

Refunds of qualified education expenses paid in 2022 if the refund is received before the 2022 return is filed

Did the student receive Form 1098-T from this institution for 2022? Yes No

Did the student receive Form 1098-T from this institution for 2021 with box 7 checked?

Educational Institution EIN _____ Name _____ Street address, city, state, and ZIP _____

Student's first and last name: _____ SSN: _____

Has the Hope Scholarship Credit or American Opportunity Credit been claimed for this student for a total of four times in any prior years? Yes

Was the student enrolled at least half-time for at least one academic period that began in 2022 at an eligible education institution in a program leading toward a post-secondary degree, certificate, or other recognized post-secondary educational credential?

Did the student complete the first four years of post-secondary education before 2022?

Was the student convicted, before the end of 2022, of a felony for possession or distribution of a controlled substance?

Is the student pursuing a degree?

Number of years the American Opportunity Credit has been claimed for this student _____

Total qualified education expenses (including the cost of books, supplies, and equipment) that were REQUIRED to be paid directly to the educational institution 2022 2021

ADDITIONAL qualified education expenses that were NOT required to be paid directly to the educational institution

Tax-free education assistance received in 2022 allocable to the academic period

Tax-free education assistance received in 2023 (and before 2022 return is filed) allocable to the academic period

Refunds of qualified education expenses paid in 2022 if the refund is received before the 2022 return is filed

Did the student receive Form 1098-T from this institution for 2022? Yes No

Did the student receive Form 1098-T from this institution for 2021 with box 7 checked?

Educational Institution EIN _____ Name _____ Street address, city, state, and ZIP _____

Schedule A - Itemized Deductions

Name:

SSN:

Medical and Dental Expenses

	2022	2021
Health insurance premiums (paid by you, not through work)		
Amount that is for Medicare premiums		
Long-term care premiums (you)		
Long-term care premiums (your spouse)		
Long-term care premiums (dependents)		
Mileage driven for medical purposes		
Before July 1, 2022		
After June 30, 2022		
Out of pocket medical and dental expenses (list)		

Charitable Contributions

	2022	2021
Donations to charity (cash)		
Disaster relief contributions		
Miles driven for charitable purposes		
Donations to charity (noncash)		
If noncash donations are greater than \$500, list below.		

Taxes Paid

State and local income taxes		
General sales tax (vehicle, boat, home, etc.)		
Real estate taxes		
Personal property taxes		
Auto registration taxes not deductible for state		
Other taxes (list)		

Other Miscellaneous Deductions

Amortizable bond premiums		
Federal estate tax		
Gambling losses		
Impairment-related work expenses		
Claim repayments		
Unrecovered pension investments		
Loss from other activities from Schedule K-1		
Ordinary loss debt instrument		
Excess deduction on termination		

Interest Paid

Home mortgage interest paid (attach Form 1098)		
<input type="checkbox"/> Some of your home mortgage loan was not used to buy, build, or improve your home.		
Home mortgage interest paid to an individual		
Paid to:		
Name _____		
Address _____		
City, State, ZIP _____		
SSN or EIN _____		
Points not reported on Form 1098		
Investment interest		

For state purposes ONLY

Job Expenses & Certain Miscellaneous Deductions

Necessary job expenses you paid that were not reimbursed by your employer (list)		

Union dues		
Tax preparation fees		
Other nonpersonal expenses related to taxable income (list)		

Investment expenses not entered elsewhere		
Home equity interest		

Residential Energy Credits

Name: _____

SSN: _____

TSJ _____

Part I - Residential Energy Efficient Property Credit

Qualified solar electric property costs _____

Qualified solar water heating property costs _____

Qualified small wind energy property costs _____

Qualified geothermal heat pump property costs _____

Qualified biomass fuel property costs _____

Was qualified fuel cell property installed on or in your main home in U.S.? Yes No

Address of main home _____

City, state, and ZIP _____

Qualified fuel cell property costs _____

Kilowatt capacity of qualified fuel cell property entered above _____

Amount of unused credit from 2021 Form 5695, line 16 _____

Part II - Nonbusiness Energy Property Credit

Were improvements or costs made to your main home located in the US? Yes No

Address of main home _____

City, state, and ZIP _____

Were improvements or costs related to the construction of this main home? Yes No

Enter the nonbusiness energy property credit that you took in:

2006 _____ 2010 _____ 2013 _____ 2016 _____ 2019 _____

2007 _____ 2011 _____ 2014 _____ 2017 _____ 2020 _____

2009 _____ 2012 _____ 2015 _____ 2018 _____ 2021 _____

Qualified Energy Efficient Improvements

Insulation material or systems primarily designed to reduce heat loss or gain _____

Exterior doors that meet or exceed Energy Star 6.0 requirements _____

Metal or asphalt roof with appropriate pigmented coatings designed to reduce heat gain _____

Exterior windows and skylights that meet or exceed Energy Star 6.0 requirements _____

Enter the amount of window expense you claimed in:

2006 _____ 2010 _____ 2013 _____ 2016 _____ 2019 _____

2007 _____ 2011 _____ 2014 _____ 2017 _____ 2020 _____

2009 _____ 2012 _____ 2015 _____ 2018 _____ 2021 _____

Residential Energy Property Costs

Energy efficient building property costs _____

Qualified natural gas, propane, or oil furnace or hot water boiler _____

Advanced main air circulating fan used in a natural gas, propane, or oil furnace _____

Adjustments

Name: _____

SSN: _____

Moving Expenses

TSJ _____

Select this box and complete the fields below if you are a member of the Armed Forces on active duty, and moved due to a military order for a permanent change of station.

	2022	2021
Enter the number of miles from your OLD home to your NEW workplace		
Enter the number of miles from your OLD home to your OLD workplace		
Enter the amount you paid for transportation and storage of household goods and personal effects		
Enter the amount you paid for travel and lodging expenses incurred during the move (do NOT include meals)		
Enter the amount of moving expenses reimbursed to you by your employer		

Self-Employed Health Insurance

TSJ _____

	2022	2021
Enter the qualified long term care amount		
Enter your Medicare wages from an S corporation		

Self-Employed Pensions

TSJ _____

	2022	2021
Enter your plan contribution rate as a decimal		
Enter your allowable elective deferrals made during 2022		
Enter your catch-up contributions		
Enter the amount of designated ROTH contributions included above		

Nondeductible IRAs

TS _____

This person is covered by a retirement plan at work or through self-employment

	2022	2021
Total traditional IRA contributions made for 2022		
Amount included above that was contributed between 1/1/2023 and 4/18/2023		
Total basis in traditional IRAs as of 12/31/2022		
Distributions you received from traditional, SEP, and Simple IRAs. (Do not include rollovers)		
<input type="checkbox"/> Distributions received were used for disaster relief		
Amount of traditional IRAs converted to ROTH IRAs		
IRA basis before conversion		
Total ROTH IRA contributions made for 2022		

Health Savings Account

TS _____

	2022	2021
The taxpayer's coverage is under a high-deductible health plan for:		
<input type="checkbox"/> Taxpayer only <input type="checkbox"/> Family		
HSA contributions made for 2022		
Total distributions from all HSAs during 2022		
Distributions included above that were rolled over into another account		
Qualified medical expenses paid using HSA distributions		

Expenses for Business Use of Your Home

Name: _____

SSN: _____

Business Use of Home

For _____ Name of business home is used for _____

	2022	2021
Square footage of home used exclusively for business-		
Total square footage of home-		

Use of Home for Daycare

	2022	2021
Area used part time for business		
Total hours used for daycare		
Total hours available		

Did you live in the home all year? Yes No

Expenses

	Office expenses		Home expenses		
	2022	2021	2022	2021	
Mortgage interest					In the "Office expenses" column, enter those expenses that pertain exclusively to your office; in the "Home expenses" column, enter those expenses that pertain to the entire dwelling.
Real estate taxes					
Excess mortgage interest					
Excess real estate taxes					
Insurance					
Rent					
Repairs & maintenance					
Utilities					
Other expenses					

Cost of Home

	2022	2021
Enter the smaller of your home's adjusted basis or its fair market value		
Does this include the value of the land? <input type="checkbox"/> Yes <input type="checkbox"/> No Value of land		
Date placed in service		
Date taken out of service		

