

Greetings!

Below you will find the 2022 Income Tax Questions, which asks about pertinent tax items necessary for preparing the most accurate tax return possible. Please answer all questions and attach a statement when necessary for additional information not provided in the 2022 Income tax Questions and/or Client Organizer Checklist.

In addition to the forms listed on the 2022 Income Tax Questions, you will also need to provide the following information:

- Forms W-2 for wages, salaries and tips.
- Forms 1099-INT, 1099-DIV, and 1099-G (local refunds).
- Brokerage statements showing investment transactions for stocks, bonds, digital assets, etc.
- Other income, such as alimony received, jury duty, etc.
- Documents for alimony paid (recipient name and SS#).
- Documents for child care credit (provider name, address, SSN/EIN, amount paid per child).

Please provide us with your 2022 tax information on or before **March 1, 2023** by using one of the following methods:

- Secure portal (<https://onvio.us>)
- US Mail
- Drop box outside of our door
- Appointment

If you do not have all your tax materials available, please provide us with the information you do have, as this will help ensure we have ample time to prepare your tax return prior to the April 18, 2023 deadline. If we do not have your tax materials by **March 1, 2023**, then filing an extension may be necessary.

Thank you for the opportunity to serve you.

Sincerely,

Fred, Lori, Jill, Santiago, and Amy

## 2022 Income Tax Questions

**\*Please do not email this form; Send via secure portal (<https://onvio.us>), mail, drop-box or appointment.\***

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**Please check the appropriate box and include all necessary details and documentation.**

**Current email address: TP:** \_\_\_\_\_ **SP:** \_\_\_\_\_

**Yes No**

### Personal Information

Did your marital status change during the year?

If yes, explain: \_\_\_\_\_

Did your address change from last year?

Did you live separately from your spouse during the last six months of the year?

Can you be claimed as a dependent by another taxpayer?

Did any of the taxpayers or dependents pass away or become legally blind during the tax year?

### COVID-19 Information

Did you receive a Paycheck Protection Program (PPP) loan?

If yes, did you apply for Paycheck Protection Program (PPP) loan forgiveness?

Did you receive any special unemployment benefits or compensation under the Coronavirus Relief Act during the year?

### Dependent Information

Were there any changes in dependents from the prior year?

If yes, explain: \_\_\_\_\_

Do you have any children under age 19 or a full-time student under age 24 with unearned income in excess of \$2,300 (dividends, interest, cap gains)?

Do you have dependents who must file a tax return?

Did you provide over half the support for any other person(s) other than your dependent children during the year?

Did you pay for child care while you worked, looked for work, or while a full-time student?

Did you pay any expenses related to the adoption of a child during the year?

If you are divorced or separated with child(ren), do you have a divorce decree or other form of separation agreement which establishes custodial responsibilities?

### Purchases, Sales and Debt Information

Did you purchase or sell a principal residence during the year?

Did you refinance a principal residence or second home this year?

Did you take out a home equity loan this year?

Did you sell, exchange, or purchase any real estate during the year?

Did you foreclose or abandon a principal residence or real property during the year (Form 1099-A)?

Did you acquire or dispose of any stock during the year?

Did you start a new business or purchase rental property during the year? If yes, complete the Business Organizer/Rental Property Organizer found at:

[www.annarbortaxservice.net](http://www.annarbortaxservice.net) - Organizers.

Did you acquire a new or additional interest in a partnership, LLC, S corporation, trust (Schedule K-1)?

Did you sell an existing business, rental, or other property this year (include closing statement and list of any improvements made while owned property)?

Did you have any debts canceled or forgiven this year, such as a home mortgage or student loan(s) (Form 1099-C)?

Did you purchase a qualified plug-in electric vehicle this year?

Did you lend money with the understanding of repayment and this year it became totally uncollectable?

**Income Information**

- Did you receive any unemployment benefits during the year (Form 1099-G)?
- Did you receive any disability income during the year?
- Did you have any foreign income or pay any foreign taxes during the year, directly or indirectly, such as from investment accounts, partnerships or a foreign employer?
- Did you receive any income from property sold prior to this year, i.e. land contract?
- Did you receive tip income not reported to your employer this year?
- Did any of your life insurance policies mature, or did you surrender any policies?
- Did you receive any income considered to be nonemployee compensation (Form 1099-NEC)?
- Did you receive a Form 1099-K, 1099-MISC, or other income statement for work done in what is commonly referred to as the "gig" economy?
- Did you receive any awards, prizes, hobby income, gambling or lottery winnings (Form W2-G)?
- Do you expect a large fluctuation in income, deductions, or withholding next year?

**Retirement Information**

- Did you make any withdrawals from an IRA, Roth, Keogh, SIMPLE, SEP, 401(k), or other qualified retirement plan (Form 1099-R)?
- If yes, were any withdrawals due to Federally declared disaster?
- If you received any qualified disaster retirement plan distributions, did you repay any of the distribution in 2022?
- Did you retire or change jobs this year?
- Did you receive any Social Security benefits during the year (Form SSA-1099)?
- Did you receive any lump-sum payments from a pension, profit sharing or 401(k) plan?
- Did you roll over any 401k or other retirement account balance to another qualified account?
- Are you an active participant in a pension or retirement plan?
- Did you make any contributions to an IRA, Roth, Keogh, SIMPLE, SEP, 401(k), or other qualified retirement plan? If yes, please include supporting documents.

**Education Information**

- Did you, your spouse, or your dependents attend a post-secondary school during the year, or plan to attend one in the coming year?
- Did you have any educational expenses during the year on behalf of yourself, your spouse, or a dependent (Form 1098-T)?
- Did anyone in your family receive a scholarship of any kind during the year?
- If yes, were any of the scholarship funds used for expenses other than tuition, such as room and board?
- Did you make any withdrawals from an education savings or 529 Plan account (Form 1099-Q)?
- Did you make any contributions to an education savings or 529 Plan account?
- Did you pay any student loan interest this year (Form 1098-E)?
- Did you cash any Series EE or I U.S. Savings bonds issued after 1989?
- Would you like a worksheet to aid in the completion of a Free Application for Federal Student Aid (FAFSA) with the U.S. Department of Education?

**Health Care Information**

- Did you have qualifying health care coverage, such as employer-sponsored coverage or government-sponsored coverage (i.e. Medicare/Medicaid) for your family?
- "Your family" for health care coverage refers to you, your spouse if filing jointly, and anyone you can claim as a dependent.
- Did you enroll for lower cost Marketplace Coverage through healthcare.gov under the Affordable Care Act? If yes, please provide any Form(s) 1095-A you received.
- Did you make any contributions to a Health savings account (HSA) or Archer MSA?
- Did you receive any distributions from a Health savings account (HSA), Archer MSA, or Medicare Advantage MSA this year? If yes, please attach Form 1099-SA.
- Did you pay long-term care premiums for yourself or your family?

**Itemized Deduction Information**

- Did you pay any mortgage interest this year? If so, please attach Form 1098.
- Did you pay any property taxes this year? If so, please attach tax statement.
- Did you make any cash or noncash charitable contributions? If yes, please provide receipt with name of donee organization, date of contributions, and value.
- Did you donate a vehicle or boat during the year? If yes, attach Form 1098-C or other written acknowledgement from the donee organization.
- Did you pay out-of-pocket medical expenses (Co-pays, prescription drugs, etc.)?
- Did you incur a casualty or theft loss or any condemnation awards during the year?
- Did you make any major purchases during the year (cars, boats, etc.)? If yes, please provide the amount of tax paid.
- Did you incur interest expenses associated with any investment accounts you held?

**Unreimbursed Employee Business Expenses - State Deduction Only**

**\*\*\*Not applicable in Michigan\*\*\***

- Did you use your car on the job, other than for commuting?
- Did you work out of town for part of the year?
- Did you have an expense account or allowance during the year?

**Foreign Financial Accounts**

- Did you receive a distribution from, or were you a grantor or transferor for a foreign trust?
- Did you have a financial interest in or signature authority over a financial account located in a foreign country, such as a bank account, securities account, or brokerage account?
- Do you have any foreign financial accounts, foreign financial assets, or hold interest in a foreign entity?

**Miscellaneous Information**

- Did you make any out-of-state purchases (by telephone, internet, mail, or in person) for which the seller did not collect state sales or use tax?
- Did you make gifts of more than \$16,000 to any individual?
- Did you pay any individual as a household employee during the year?
- Did you utilize an area of your home for business purposes?
- Did you incur moving costs because of a permanent change of station as a member of the Armed Forces on active duty?
- Did you make energy efficient improvements to your main home this year (solar, windows, furnace, HVAC, etc.)?

**Estimated Tax Payments**

Did you make any estimated tax payments? If so, provide dates and amounts

| <b>Federal</b>      | <b>Date</b> | <b>Amount</b> |
|---------------------|-------------|---------------|
| #1                  | _____       | _____         |
| #2                  | _____       | _____         |
| #3                  | _____       | _____         |
| #4                  | _____       | _____         |
| <b>State: _____</b> | <b>Date</b> | <b>Amount</b> |
| #1                  | _____       | _____         |
| #2                  | _____       | _____         |
| #3                  | _____       | _____         |
| #4                  | _____       | _____         |

**Correspondences**

- Did you receive correspondence from the State or the IRS?
- If yes, explain: \_\_\_\_\_
- Did you, your spouse, or any of your dependents receive an Identity Protection PIN (IP PIN) from the IRS or have you been a victim of identity theft? If yes, attach the IRS letter for filing returns in 2022.

Yes No

**Tax Refund/Payment**

If you are receiving a tax refund, would you like the refund direct deposited into your bank account?

If you owe tax, do you want the funds electronically withdrawn from your bank?

If yes, do you want the funds withdrawn on April 18?

If other date is requested, please specify. \_\_\_\_\_

If you want direct deposit or electronic payment of your taxes from your bank account, please provide the required banking information below.

Financial Institution Name: \_\_\_\_\_

Routing Number: \_\_\_\_\_

Account Number: \_\_\_\_\_

Account Type (checking or savings): \_\_\_\_\_

Account owner (joint, taxpayer, or spouse): \_\_\_\_\_

**Digital Currency \*\*\*Required by the IRS\*\*\***

Did you have any sales or other exchanges of digital assets (including from an airdrop or a hard fork), or used digital assets to pay for goods or services?

**\*\* I (we) have read and replied to all questions appropriately.**

Taxpayer signature: \_\_\_\_\_

Spouse signature: \_\_\_\_\_