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Organizer for 2022 Tax Year

Personal Information:

NAMES: Taxpayer/ Spouse	SS NUMBER	DATE OF BIRTH	OCCUPATION

TAX ADDRESS: _____

MAILING ADDRESS: _____

HOME PHONE _____ CELL _____ Best time to call: _____

*****EMAIL ADDRESS: _____*****

Marital Status as of Dec 31 2022:

Single
 Married filing joint
 Married filing Separate
 Head of Household
 Same Sex Married

Blind? TP _____ Sp _____ Disabled? TP _____ Sp _____

DEPENDENTS:

Full Name	Date of Birth	SS#	Mos. Lived with You	College Student	Gross Income

CHILD CARE EXPENSES:

Name of Provider: _____ Tax ID Number-or-SS# _____
Address: _____ Amount Paid: _____
Name of Provider: _____ Tax ID Number-or- SS# _____
Address: _____ Amount Paid: _____

INCOME:

Wages, Salary Income:

How many W2's included? _____

Interest Income:

How many 1099 INT & Broker statements included? _____

Dividend Income: From Mutual Funds & Stocks—Include 1099 Div

How many enclosed? _____ Brokerage House: _____

INVESTMENTS SOLD: I must have this information or the entire sale will be taken as a gain! Brokerage houses will provide this info, but if they do not, you must provide it!

INVESTMENT	Date Bought/Sold	Cost	Sale Price

Please include 1099B.

Did you own/trade cryptocurrency? Please include information.....

Partnerships, Trust, Estate Income:

For Partnerships, Limited Partnerships, S-Corporations, Trust or Estate Income, PLEASE ENCLOSE K1's.

I.R.A. Contributions for 2022 made directly to your account (Not payroll)

Taxpayer Amount _____ Date made: _____ Roth? _____

Spouse Amount _____ Date made: _____ Roth? _____

Pension & Annuity Income:

Did you receive a pension? _____ From where? _____

Did you make a withdrawal from your IRA or 401K? _____ Did you roll it over? _____

Enclose deposit form...

Did you or spouse receive Social Security? If so, please enclose SSA 1099.

Other Income:

Alimony _____ Received or paid? _____ Date divorce finalized _____
Unemployment _____ Please include 10-99G _____ Scholarships _____
Gambling _____ Lottery _____ Commissions _____
Jury Duty _____ State Refund _____ Other _____
Workman's Comp _____ Rental (please call me) _____

Income Adjustments:

Alimony paid _____ Name & SS# _____ Student Loan Interest _____
Alimony received _____ From: _____ SS# _____

Renters Credit: CA/NJ/MA/MN/other states

Annual Residential Rent: _____ Did you share? _____ No of roommates _____

DEDUCTIONS: Must be more than 7.5% of your income to deduct.

Medical

Medicine: _____ Insurance: _____
Long Term Care _____ (paid for directly by you, not payroll)
Insurance: _____ Doctors, Nurses: _____
Dentists: _____ Hospitals: _____
Glasses, Contacts: _____ X-rays, Labs: _____
Transportation/Lodging _____
Medical milage _____ (to & from doc's, hospitals, facilities)

Taxes

State taxes paid by check
W/2021 return: _____ Real Estate taxes: _____
Personal Property Taxes: _____
Sales Taxes paid in a state with no state tax:

Auto Registration ** _____

Did you make out of state purchases for which you owe state tax? _____

Interest

Home Mortgage: _____ Coop Mortgage: _____
Home Equity Loan: _____ Deductible Points: _____
Home Mortgage Paid to an _____

Individual: _____
 Name: _____ SS#: _____
 Address: _____

Gifts to Charity

Contributions: Paid by check, credit card, cash, payroll w/holding: _____
 Contributions of Clothing, Furniture, Etc...Fair Market Value * _____
 *If over \$500, the IRS requires a supporting schedule! Please include date of contribution, charity, tax ID number, address & description of items, date of original purchase & original price.

For Donations of more than \$250, you must have receipts in your possession by the tax filing date.

Other deductions: available only on certain state returns

Tax return prep fees _____ Safe deposit box _____
 Investment publications _____ IRA management fees _____

Home owners credit

NJ: Block _____ Lot _____
 CT: Town _____ List/Bill # _____ Date Paid _____

CT auto tax credit Town: _____ Make: _____ Year: _____
 Bill Number: _____ Date paid _____ Amount _____

****Applies only to: AZ, CA, CO, CT, GA, IN, IA, ME, MA, MN, MS, MT, NE, NV, NH, OK, WA & WY.**

Continuing Education & College Student Credit

Student's Name	Type of Expense	Amount	Year in School

Please include 1099T from school. Please include bursar's statement of actual tuition/fees paid

Please provide name of school: _____

Contribution to 529? State: _____ Amount: _____

Withdrawal from 529 for tuition payment? _____

To the best of my knowledge, the enclosed information is correct and includes all income, deductions and other information necessary for the preparation of this year's tax return, for which I have adequate records.

_____ Date _____
_____ Date _____

Do you wish Direct Deposit? Y N

Please enclose a voided check...or if it is the same account as last year, please enter name of bank, and last 4 numbers of account.

The checklist below could lead to helpful deductions. Please answer and provide supporting documents. All questions pertain to 2022 only!

Y N Were adjustments made **by the IRS or any state** to any prior 3 years returns?

- Y N Did your marital status changes in 2022?
- Y N Did you have any new dependents in 2022?
- Y N Did you pay more than half the cost for supporting a parent?
- Y N Did you receive a distribution from a __qualified employer plan __IRA or __529?
Check all that apply.
- Y N If yes, did you roll over the distribution to an IRA? Within 60 days?
- Y N Did you buy/sell any stocks/bonds/mutual funds (not IRA) in 2022?
- Y N Did you buy/sell your home? If so, please provide us with closing statements for purchase & sale.
- Y N Did you refinance your mortgage or take an equity loan on your 1st or 2nd home?
- Y N Did you give or receive gifts more than \$15,000?
- Y N Did you have a casualty or theft loss? If so, please contact me for info I need.
- Y N Did you have any income from foreign sources, not reported on 1099's? Were any
Foreign taxes withheld?
- Y N Did you have a foreign bank account or security account? If yes, which country?

- Y N Did you have foreign bank or security accounts with over **\$10,000** in the aggregate during the year?
- Y N If yes, and you live in US, was it over \$50,000(single) or \$100,000(married)?
- Y N Do you own foreign property? Has it been reported on your tax return before?
- Y N Check yes to allow Mary Ann to discuss this return with IRS/state if necessary?
- Y N Check yes to allow Mary Ann to set your e-filing pin.
- Y N Do you want hard copy of return?

Per the IRS, you are required to keep records that will enable you to prepare an accurate & complete tax return. You are required to retain all receipts, cancelled checks, bank statements and other evidence to support amounts claimed as deductions. You must keep your records as

long as they might be material in administering any IRS law. In most instances, this is 3 years after the date of filing your return.

The Tax and Jobs Act of 2018 has eliminated the employee expense deduction for your Federal Return. However if you live in: **NY, CA, MN, IA, HI, AL, AR or PA**.....you can still deduct your expenses on your STATE return ONLY! This is why I have included this worksheet for you.....

DEDUCTIONS FOR FLIGHT CREW

Please fill in amounts, not just a check mark!

UNIFORM ITEMS

- Boots
- Ear Protector
- Hats
- Gloves
- Jackets
- Scarves
- Shoes (onboard only)
- Shoe Polish/ Shine
- Shoe Repairs
- Shirts
- Skirts
- Stockings
- Support Hose
- Sweaters
- Ties
- Misc Uniform Items

UNIFORM MAINTENANCE

- Alterations
- Cleaning
- Laundry
- Laundry Supplies
- Repairs

LUGGAGE/TRAVEL ITEMS

- ID Case
- Map Case

COMMUNICATION/BID SERVICE

- Answering Machine
- Answering Service
- Beeper
- Bid Fees
- Extra Phone Line
- Faxes
- Internet Charges
- Pager
- Cell Phone
- Bid Service

TOOLS & EQUIPMENT

- Batteries
- Briefcase
- Business Cards
- Calculator
- Clipboard
- Computer (date purchased & cost)
- Ear Protectors
- Modem/Cable
- Notebooks
- Printer
- Safety Equipment
- Subscriptions
- Travel Books
- Flashlight

- _____ Maps
- _____ Passport Case
- _____ Repairs
- _____ Suitcase(s)
- _____ Travel Bags
- _____ Travel Case
- _____ Port-O-Lock

Association/Union Dues

- _____ Union Dues
- _____ Initiation Fees
- _____ Union Meetings
- _____ Professional Subscriptions

TRANSPORTATION

- _____ Taxi to Short Calls
- _____ Taxi from Mailbox Airport
to Work Airport

PERSONAL ITEMS

- _____ Haircuts
- _____ Manicures
- _____ Make-up
- _____ Face Creams
- _____ Moisturizers
- _____ Toiletries
- _____ Bug Spray
- _____ Sanitizers
- _____ FAA Physical
- _____ Loss of License/
Medical Insurance

PASSPORT/PASSPORT FEES

- _____ Immigration Fees
- _____ Photos
- _____ Global Entry
- _____ Visa Fees
- _____ Mailing Fees/Transportation

TRAINING/EDUCATION

- _____ Books
- _____ Language Dictionaries
- _____ Language Tapes
- _____ Language Courses
- _____ Professional Publications

PLEASE INITIAL _____

MISC FEES

- _____ Atm Fees on Layovers
- _____ Credit Card Fees
- _____ Exchange Fees
- _____ If WORKING flight cancelled,
Hotel/cab/food expense