

Visit us at our website - www.jackskehan.com and on Facebook often for newsletters, tax news and tips.

2022 Tax Appointment Checklist and Questionnaire

YOU are responsible for the information on your tax return.

Please take a few minutes before your appointment to answer this questionnaire and review the checklist of requested documentation.

Your efforts to provide complete and accurate information help us to speed a larger refund to your door!

To combat ID theft, for 2022 returns, we are required to verify your identity with a Driver's License or State ID, please provide for taxpayer and spouse if applicable

Name(s): Date:		
Address: Same as last filing New:		
Phone (Best contact): Alternate Phone:		
May we contact you by e-mail? Yes No		
E-Mail Address: Alternate E-Mail:		
<u>General</u>	Yes	No
Do you have ALL records to substantiate the personal and business deductions you are claiming on your 2022		
tax return, including a MILEAGE LOG?		
Did you (or your spouse or dependents, if applicable) purchase health insurance from the Healthcare Marketplace?		
If yes, Please bring Form 1095-A		
Are any non-dependents covered by this policy? (The premiums will need to be allocated and included on their filing.)		
Did you pay or receive alimony in 2022? Date of the Divorce Settlement		
For divorce settlements after 2018, alimony is no longer taxable or deductible. (If Pre-2019 decrees are modified, please bring a copy)		
Did you work or live in a state other than Maine in 2022?	$\downarrow \downarrow \downarrow$	
Do you need to file a State Tax Return other than Maine for any reason?	$\downarrow \downarrow \downarrow$	
Did the IRS, Maine or any State tax authority make changes to one of your prior tax returns during the last year?	ightarrow	
Do you know of any changes to a prior year's information which would require an amended return?	$\downarrow \downarrow \downarrow$	
Have you been a victim of tax related identity theft?		
If you received an Identity Theft Pin from the IRS, please bring it to your appointment.		
Did you pay anyone not in business \$2400 or more in 2022 for housekeeping, babysitting, home health care, yard work, etc.?	\bot	
Did you or your children have bank accounts in a foreign country that had a combined balance over \$10,000 at any time in 2022?	+	
Did you have foreign assets (stock, pension, life insurance, etc.) worth over \$50,000 (100,000 if married) in 2022?	$+\!-\!-\!+$	
Did you make gifts of over \$16,000 (cash or property) to an individual during 2022?	$+\!-\!+$	
Did you have children under 18 (or full time student 18-23) who had investment income greater than \$400 in 2022?	$+\!-\!-\!+$	
Did you make estimated Federal or State income tax payments?		
Please bring proof of payments. (The Jan. 2023 payment is for tax year 2022 and the Jan. 2022 payment is for tax year 2021)		
Estimated payments can be scheduled as an automatic payment. Would you find this helpful?		
Tax Planning		
Do you expect significant changes in income, deductions, or dependents for 2023?	$\downarrow \downarrow \downarrow$	
Do you plan to retire in 2023?		
If so, would you like to talk to our office about retirement planning?		
We provide a complimentary consultation (up to an hour or so) from May thru December for all clients.		
Administrative Matters		
Would you like to have your refund directly deposited to your accounts?		
Have you changed bank accounts since your prior year filing?		
Please provide the routing and account numbers for up to three accounts, including savings, checking, investment		
or IRA accounts or you may purchase U.S. Savings Bonds. Note: The State of Maine permits deposits to only one account.		
Would you like to have our tax preparation fees deducted from your refund? (A paperwork fee applies)		
Do you have any past due bills, to Federal or State Authorities including tax or student loans		
that would prevent a refund being issued? (If yes, this option is not available)	igspace	
Would you like your copy of the tax return on disc?		

Do names and social security numbers of the taxpayers and any dependents EXACTLY match the social security cards?		
On December 31, 2022, Were youMarriedSingle?		
If you are married and filing separately from your spouse, do they itemize deductions?		
Are you or your spouse legally blind?		
If your name has changed since your last tax filing, have you notified Social Security?		
Did you have any new dependents in 2022?Child,Adopted Child,Foster Child,Parent,Other		
For all dependents not in our files: Please provide the Social Security card		
If claiming any dependent not living in your custody, a signed Form 8332 is required (we can provide this form in advance)		
Are any dependents that you claimed in 2021 now claiming their own exemption or being claimed by someone else?		
Did you help support anyone else who may or may not live with you?		
Did anyone else live with you who is not listed on your tax return? Names,		
Did you pay forchild oradult daycare?		
If yes, has your provider been certified by the State of Maine as a "Step 4 Child Care Quality Daycare"?		
The provider should furnish a receipt showing the amount paid, their name, address, ID number and Quality number, if applicable.		
If you have dependents who need to file a tax return, would you like help with those returns?		
If so, please provide a consent form (available by mail, fax or at www.jackskehan.com), signed by your dependent.		
<u>Income</u>		
Did you receive payment during 2022 for work performed as an employee?		
If yes, please complete this section.		
Bring W-2s and the <u>final pay stub</u> from all employers		
Did you receive or sell stock from an employer stock plan? Bring grant and exercise statements		
Were you either self-employed, full or part-time, or did you own rental property during 2022?	_	
If yes, please complete this section.		
Did you_startor terminate a business orbuy orsell a rental property?		
Did you receive during 2022, any loans or grants due to Federal or State COVID Relief programs?	\dashv	
If so, has or will the repayment be forgiven?		
Did you participate in the "Sharing Economy" renting your home (AirBNB), Car (Uber, Lyft, Jane) or other?		
Did your business or rental make any payments (mostly for services or rent) over \$600		
to an individual or unincorporated business, requiring a Form 1099 to be filed?		
If yes, have you filed these forms with the IRS and the service provider?		
Did you purchase gas or diesel fuel "at the pump" for off highway business or farm use?		
If you use software such as QuickBooks for record keeping, please bring an accountant's or backup copy of your file on a flash drive.		
If not, bring a complete list of income from all sources and a categorized summary of expenditures,		
Don't overlook health insurance premiums. Also include beginning and ending inventory, if applicable.		
Please provide complete payroll records including copies of ALL federal and state payroll tax returns and W-2 Forms.		
If any real estate purchases and/or improvements, Please provide the date and cost, the HUD closing statement and tax bill.		
If any vehicle or equipment purchases or trades, provide a list of items, dates and cost (please bring invoices on large purchases).		
If any assets weresold,traded orabandoned, provide a list, including date and selling price		
Please review your current depreciation list (from last year's return) and tell us of any assets you no longer own		
New clients, please provide a depreciation report from prior year return		
Did you use your vehicle in your work (self-employment, partnership orrental) other than for commuting?	П	
Note: Vehicle Expenses will not be allowed by the IRS without adequate records verifying business use.		
If yes, please complete this section.		
Please provide your MILEAGE LOG or a SEPARATE, WRITTEN statement for EACH vehicle used including:		
Sales invoice if new vehicle purchase		
Beginning & ending mileage for 2022 BUSINESS mileage separated into first and second half of the year		
Registration and excise tax, Interest on vehicle loan, Parking and tolls		
If using "actual expense method", gas, repairs, insurance and other expenses		
Did you use a portion of your home exclusively as anoffice, shop or for storage in connection with your		
business? If yes, please complete this section.	$\overline{}$	
Bring the total amounts paid for mortgage interest, property tax, rent (if applicable), insurance, utilities,		
repairs,improvements,trash removal,plowing andother expenses.		
If first business use, we need the cost of your home with improvements and a current real estate tax bill,		
the measurements of your home and the area used for office, shop or storage.		
For daycare, we also need the total hours the home was used for daycare during the entire year.		
If using optional "Standard Allowance Method", we only need the measurement of the business portion of your home.		

Did you receive income from banks or investments or sell any type of property, stocks or mutual funds during 2022?	
If yes, please complete this section.	<u> </u>
Did you receiveinterest,dividends,capital gains distributions or did you sellstock ormutual funds?	
Please provide all 1099 Forms and the Year End Brokerage Statements (this may have a lot of useful information)	
Did any stocks, bonds or securities that you own become worthless this year?	
Did you trade (buy or sell) currencies during 2022?	
Did you receive, buy, sell and/or dispose of any digital assets such as Bitcoin, Ethereum, NFT's during 2022?	
Did you sellyour home,timber,land,vacation property orother assets, or were any holdings condemned?	
Bring all 1099-S or other forms, the HUD statement, the purchase date(s), cost, and any additional investments (improvements), etc.	
Did you exchange real estates you owned for similar assets (commonly referred to as a Sec. 1031 exchange)?	
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Did you receive a 2020 retirement plan distribution due to hardships caused by COVID?	
If yes, did you repay any of the distribution during 2020, 2021 or 2022?	
	<u> </u>
If you are age 72 and have an IRA or retirement plan, have you taken your Required Minimum Distribution?	
	<u> </u>
Did you receive Social Security or any distributions from a retirement plan or IRA during 2022?	
If yes, please complete this section. (Bring your 1099-R and SSA 1099 forms and year end pay stub(s) if applicable for each plant the section of the section	an.)
Did you receive income fromSocial Security, orSocial Security Disability?	
Did you receive income from anInvestment plan (Annuity) orLife Insurance policy?	
Did you receive income from a Pension Plan [401(k), 403(b), 457(b)]?	
Are you a retired public safety officer (police officer,firefighter,game warden, parole officer, other)?	
Did you receive income fromTraditional IRA or Roth IRA?	
Have you or your spouse ever made a contribution to a traditional IRA that wasn't fully deductible?	
Did you have a payment from your IRA paid directly to a charity?	
If this was a distribution before age 59 1/2, was it due to disability,death,divorce,first-time home purchase,	
education,medical expenses,unemployment,military service,separation from company (after age 55) orIRS levy?	
Did you receive money from any other sources during 2022?	
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For Tax Year 2022, there is no benefit to itemization unless your total itemized deductions exceed the new Standard Deduction amounts of				
\$12,950 Single, \$19,400 Head of Household or \$25,900 Married Filing Joint, increased slightly for those over 65.				
See 2021 Form 1040, Line 12 for last year's deduction amount for reference.				
Those CERTAIN their deductions are less than these amounts, may skip this section and check here				
Medical expenses (only deductible if more than 7.5% of Adjusted Gross Income)	-			
Did you pay forhealth,Medicare,Medicare supplement orlong term care insurance?				
Include premiums paid directly and/or from your pension or paycheck, unless paid on a pre-tax basis				
Also provide Form 1095-A issued by the Exchange if received	_			
Did you pay medical bills for your family (or possibly others)?				
Includedoctors,dentists,prescriptions,insulin,eyeglasses,contact lenses and solution,medical supplies,PPE				
hearing aids and batteries,other medically necessary expenses, andhome renovations made for medical reasons.				
medically necessary home health services and private pay aides (including insurance and payroll taxes)				
Include mileage to and from hospitals, medical appointments and pharmacies and lodging if applicable.	ı			
Did you buy amotor vehicle,building materials,boat orother large purchase?				
Please bring your receipt(s); the sales tax may be deductible				
Did you register anauto,truck,motorcycle,boat orRV?				
Please bring the excise tax amount (and maybe the registration) for each.	T			
Did you own ahome,second home (includingtimeshare,motorhome orboat that qualifies) orother property?				
Please provide property tax and/or mortgage interest statements (Form 1098).				
Home Equity loans not used to buy, build or improve your home are no longer deductible.				
If youpurchased orrefinanced in 2022, please bring the HUD closing statement				
Did you make <u>cash contributions to charity</u> ? You must have receipts (cancelled checks are okay under \$250).				
Written acknowledgement from the charity is required for all contributions and donations of \$250 or more.				
List total contributions to each charity, including those deducted from your pay.				
Don't forgetout of pocket expenses ormileage incurred as a volunteer doing charitable work.				
Did you make <u>donations of property</u> (<u>clothes,furniture,computers,bottles,food,</u> auto,stock,				
land,artwork or collectable, other appreciated property, etc.) to charity?				
If you donated an auto, the charity must provide a statement of value (Form 1098-C).				
Please provide the donation date, charity's name and the value of donated property (appraisals are needed if over \$5000).				
If the total non cash donations for the year are over \$500, also provide the charity's address.				
For suggested values see http://www.satruck.org/donation-value-guide or http://www.goodwillnne.org/donate/donation-guide.				
Did you have acasualty loss, or property taken from you bydestruction,theft, orseizure?				
Generally this loss is only deductible if it occurs in a Federally declared disaster area.				
Tell us the nature, loss amount and amount of any insurance reimbursement.				
State of Maine				
Did you make purchases on-line, in another state or directly (private sale) for which you may owe Maine sales tax?				
You may qualify for the Student Loan Repayment Tax Credit - a credit based on certain education loan repayments made in 2022.				
Did you graduate from a College after 2007, work in Maine and make Student Loan payments?				
Did you make educational loan payments for an employee?				
If eligible, please bring 2022 transaction history showing the monthly amount due and payment amount.				
First time applicants will additionally need their college transcript.				
Did your employer pay or reimburse your student loan payments? Please bring your end of year paystub.				
The Maine Property Tax and Rent Refund Program was replaced by the Property Tax Fairness Credit during 2015.				
This is for households with less than \$34,167 (single) or \$55,000 to \$68,000 (head of household or married filing jointly depending on the number of exemptions) income. The credit is included on your Maine Tax Return.				
Please provide the amount of property tax (home and 10 acres) or rent paid in 2022 and your landlord's name and phone number.				
Have you applied for the Homestead or Veteran's Real Estate Tax Exemption through your local city or town?				
Have you applied for the Property Tax Stablization Program?				
Payment for Services		•		
Payment is due when you sign and receive your completed tax forms.				
Cash, Check, Debit Cards, Visa, MasterCard, Discover, Apple and Android Pay are accepted.				
Comments, Questions or Concerns				