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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: _____

General

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?		
Do you need to file a State Tax Return other than Maine for any reason?		
Did the IRS, Maine or any State tax authority make changes to one of your prior tax returns during the last year?		
Do you know of any changes to a prior year's information which would require an amended return?		
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.?		
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?		
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)		
Would you like your copy of the tax return on disc?		

Personal Information / Dependents

Yes No

Do names and social security numbers of the taxpayers and any dependents EXACTLY match the social security cards?	<input type="checkbox"/>	<input type="checkbox"/>
On December 31, 2022, Were you __Married __Single?		
If you are married and filing separately from your spouse, do they itemize deductions?	<input type="checkbox"/>	<input type="checkbox"/>
Are __ you or __ your spouse legally blind?	<input type="checkbox"/>	<input type="checkbox"/>
If your name has changed since your last tax filing, have you notified Social Security?	<input type="checkbox"/>	<input type="checkbox"/>
Did you have any new dependents in 2022? __Child, __Adopted Child, __Foster Child, __Parent, __Other	<input type="checkbox"/>	<input type="checkbox"/>
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?	<input type="checkbox"/>	<input type="checkbox"/>
Did you help support anyone else who may or may not live with you?	<input type="checkbox"/>	<input type="checkbox"/>
Did anyone else live with you who is not listed on your tax return? Names _____, _____	<input type="checkbox"/>	<input type="checkbox"/>
Did you pay for __child or __adult daycare?	<input type="checkbox"/>	<input type="checkbox"/>
If yes, has your provider been certified by the State of Maine as a "Step 4 Child Care Quality Daycare"?	<input type="checkbox"/>	<input type="checkbox"/>
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?	<input type="checkbox"/>	<input type="checkbox"/>
If so, please provide a consent form (available by mail, fax or at www.jackskehan.com), signed by your dependent.		

Income

Did you receive payment during 2022 for work performed as an employee?	<input type="checkbox"/>	<input type="checkbox"/>
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	<input type="checkbox"/>	<input type="checkbox"/>
Were you either __self-employed, full or part-time, or __did you own rental property during 2022?	<input type="checkbox"/>	<input type="checkbox"/>
If yes, please complete this section.		
Did you __start __or terminate a business or __buy or __sell a rental property?	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive during 2022, any loans or grants due to Federal or State COVID Relief programs?	<input type="checkbox"/>	<input type="checkbox"/>
If so, has or will the repayment be forgiven?	<input type="checkbox"/>	<input type="checkbox"/>
Did you participate in the "Sharing Economy" renting your home (AirBNB), Car (Uber, Lyft, Jane) or other?	<input type="checkbox"/>	<input type="checkbox"/>
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?	<input type="checkbox"/>	<input type="checkbox"/>
If yes, have you filed these forms with the IRS and the service provider?	<input type="checkbox"/>	<input type="checkbox"/>
Did you purchase gas or diesel fuel "at the pump" for off highway business or farm use?	<input type="checkbox"/>	<input type="checkbox"/>
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, <u>Don't overlook health insurance premiums.</u> 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 were __sold, __traded or __abandoned, 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 or __rental) other than for commuting?	<input type="checkbox"/>	<input type="checkbox"/>
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 an __office, __shop or __for storage in connection with your business? If yes, please complete this section.	<input type="checkbox"/>	<input type="checkbox"/>
Bring the total amounts paid for __mortgage interest, __property tax, __rent (if applicable), __insurance, __utilities, __repairs, __improvements, __trash removal, __plowing and __other 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.		

	Yes	No
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.		
Did you receive __ interest, __ dividends, __ capital gains distributions or did you sell __ stock or __ mutual 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 sell __ your home, __ timber, __ land, __ vacation property or __ other 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)?		

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?		

If you are age 72 and have an IRA or retirement plan, have you taken your Required Minimum Distribution?		
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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 plan.)		
Did you receive income from __ Social Security, or __ Social Security Disability?		
Did you receive income from an __ Investment plan (Annuity) or __ Life 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 from __ Traditional 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) or __ IRS levy?		

Did you receive money from any other sources during 2022?		
If yes, please complete this section.		
Please check the source and provide all forms that you receive: We can advise you of the taxability of this income. __ Unemployment (1099-G), __ Cancelled/forgiven/partially forgiven debt (Form 1099-A or Form 1099-C) (for credit cards or mortgage for example), __ Long term care, __ Health care and/or __ Other insurance reimbursements, __ Disability payments, __ Education, __ Scholarships, __ Gambling(Form W-2G), __ Jury duty, __ Other 1099M Forms, __ Income from a hobby, __ Form K-1 from corporation/partnership/trust/estate, __ Inheritance, __ Bartering income or __ Any other income __ Damage award for __ Personal injury, __ Sickness or __ Discrimination		

Credits and Adjustments to Income

Did you or any family member attend classes at a college or trade school in 2022? Names _____, _____ Bring form 1098-T AND a DETAILED STATEMENT OF ACCOUNT ISSUED BY THE COLLEGE OR SCHOOL. Also include amounts paid for books and supplies.		
Are you paying student loans? Please provide the interest statement (Form 1098-E).		
Did __ you or __ your spouse work 900 hours in a school district and purchase materials for classroom use?		
Did you participate in a Health Savings Account? [This is different than a cafeteria or flex-pay plan.] Please bring Forms 1099-SA and 5498-SA (or other record of contributions).		
Did (or will) you contribute to a __ Traditional or __ Roth IRA or __ Health Savings Account for 2022 by April 15, 2023?		
Did (or will) you take any withdrawals from a retirement plan [401(k), 403(b), 457(b) or IRA] in 2020, 2021 or 2023 (before Apr.15)? (We may have this for established clients - This may affect the retirement savings contribution credit.)		
Did you purchase a renewable energy system or Energy Star rated improvements for your home? __ Solar, __ Wind, __ Geothermal, __ Biomass, __ Fuel Cell __ furnaces, __ water heaters, __ insulation & weather-stripping, __ windows, __ doors		
Did you purchase a new __ Electric or __ "Plug-in Hybrid" vehicle? Non-refundable credits may be available.		
Did you buy a new home in 2008 and participate in the first-time homebuyer (loan) program? Do you still own and use this home as your primary residence? (Yearly payments, up to \$500, are required as part of your filing.) If no, has the loan been repaid?		

