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2022 RETURNING CLIENT TAX ORGANIZER WORKSHEET

Date information submitted _____

Names

Taxpayer	Spouse
Filing Status: <input type="checkbox"/> Single <input type="checkbox"/> Head of Household <input type="checkbox"/> Married-Filing Jointly <input type="checkbox"/> Married-Filing Separately	

Dependents – Who are we claiming this year

First Name _____ **First Name** _____

First Name _____ **First Name** _____

First Name _____ **First Name** _____

ANY CHANGES TO ADDRESS, EMAIL, PHONE, DIRECT DEPOSIT OR DRIVERS LICENSE?

NO _____ (Initials)

Yes- Make changes below

Street Address	City	State	Zip
Primary Contact Telephone		Secondary Contact Telephone	
Email		Secondary Email	

If your Driver’s License was renewed since last year we need a copy.

-Banking Information - We need just the last 4 digits for cross reference

FOR REFUNDS:

ROUTING NUMBER: _____ **ACCOUNT NUMBER:** _____

Yes No

- Did your marital status change during the year?
If yes, please explain: _____
- Did you sell, exchange, or purchase any real estate during the year?
- Did you acquire or dispose of any stock during the year?
- Did you take out a home equity loan this year?
- Did you refinance a principal residence or second home this year?
- At any time during 2022, did you receive, sell, send, exchange, or otherwise acquire any financial interest in any Virtual (Bit Coin) currency?
- Did you make any withdrawals from a retirement account?
- Did you make any withdrawals from an education savings/529 Plan account?
- Did you make charitable contributions? Amt of cash_____ non cash_____
- Did you have any educational expenses during the year?
- Did you have any student loan interest?
- Any solar installed or
- Did you have any Child Care expenses?
- Did you or any of your dependents have healthcare.gov medical insurance. If yes, please have your 1095A ready. (Obamacare)
- Did you have an HSA Account? If yes amount of distribution _____

Communication Preference:

Phone call _____ **Text Message** _____ **Email** _____

How do you want to receive your tax return?

Email _____ **USB** _____ **Paper Copy** _____