

TODAY'S DATE

INCOME TAX DATA ITEMIZER

TAX YEAR
2022

NEW CLIENT NEW ADDRESS LEGALLY BLIND CLOUD ACCESS

TAX PAYER'S NAME: _____ SS # _____
 SPOUSE'S NAME: _____ SS # _____
 TAX PAYER'S OCCUPATION: _____ BIRTH DATE: _____
 SPOUSE'S OCCUPATION: _____ BIRTH DATE: _____
 STREET ADDRESS: _____ CITY: _____ STATE: _____ ZIP CODE: _____
 COUNTY _____ SCHOOL DISTRICT: _____
 HOME PHONE NUMBER: _____ EMAIL ADDRESS: _____

DEPENDENTS: Relationship:

1). _____ SS# _____ BIRTH DATE: _____
 2). _____ SS# _____ BIRTH DATE: _____
 3). _____ SS# _____ BIRTH DATE: _____
 4). _____ SS# _____ BIRTH DATE: _____

FORMS & THINGS TO BRING

W-2: How Many? _____ K-1 How Many? _____ 1099 R's _____ Social Security Forms How Many? _____ Energy Tax Incentives _____
 Last Year's Tax Return (New Clients Please Provide) _____ Alimony Paid or Received: _____
 Purchase New Home/Refinance Existing? (Include Closing Papers) _____ Spouse SS# _____ DV/Sep Date _____
 Health Savings Account (HSA) _____ Early Withdrawal Penalty – How Much? _____
 Educator Expenses _____ Virtual Curr Trading Yes No Any Foreign Bank Accounts Yes No

INTEREST & DIVIDEND INCOME

	PAYER	\$		PAYER	\$
INTEREST			DIVIDENDS		
INTEREST			DIVIDENDS		
INTEREST			DIVIDENDS		

OTHER INCOME

COLLEGE INFORMATION

Jury Duty _____ Who Attended Institution Tuition Paid Books/Supplies
 Unemployment _____
 Fed. Unemploy WTH Tax _____
 State Unemploy WTH Tax _____
 Other Income _____ 2021 Tax Refund (State Only) _____
 Gambling/Bingo/ Lottery Winnings _____ Student Loan Interest _____ Forgiven? _____

How Do You Want to Receive Your Refund? Pay Balance Due?

Check Direct Deposit/Debit ROUTING #: _____ ACCOUNT #: _____

PAYMENTS TO RETIREMENT PLANS

ESTIMATED TAXES PAID

Carry Forward APRIL 15 JUNE 15 SEPT 15 JAN 15
 2022 2022 2022 2023

ROTH: _____
 IRA Traditional: _____ Fed. _____
 IRA Simple: _____ State _____
 SEP/Solo 401K: _____

SALE OF STOCK OR OTHER PROPERTY

DESCRIPTION	DATE BOUGHT	DATE SOLD	SALE PRICE	COST PRICE

