Tax Year 2022 Organizer

SONRISE TAX

Taxpayer Name & Primary Occupation: ______________________________

Spouse Name & Primary Occupation: ______________________________

MILITARY PERSONNEL MUST PROVIDE ALL ORDERS/LES's FOR ALL ACTIVE DUTY TO AVOID TAX!!!

E-Mail Address : ______________________________

* ***Your Privacy*** is #1 !! We use your e-mail strictly to communicate tax information to you personally. We ***do not*** compile, rent, sell, or solicit!

Contact Phone #'s

Best Phone #: ____________ (Home / Work / Cell) ***Text ?*** Yes No

Who? ____________ Best Time to Call/Text: ____________

Secondary Phone #: ____________ (Home / Work / Cell) ***Text ?*** Yes No

Who? ____________ Best Time to Call/Text: ____________

***Please indicate if we can text you at these numbers! It allows us to be more efficient in communicating with you!**

PLEASE make us aware of any changes such as your address, phone, e-mail, marital status or change in dependents!!!

Did you have an address change in 2022? ❒ No ❒ Yes - ***(Please provide Settlement Sheets if you bought or sold!)*** ☐

Address on 1/1/2022? ______________________________

Next Address ? ______________________________ Dates: ________thru________

Next Address ? ______________________________ Dates: ________thru________

❒ Yes ❒ No **2022 Filing Status change?** >>Date: __________ Married Separated Divorced Deceased ☐

*We may need/ask for proof (Marriage Cert, Divorce Decree, Death Cert etc) (***Please provide SS Card for any Name Change!***)

❒ Yes ❒ No **Change in Dependents?** ❒ Not Sure/Have Questions ☐

Add	Drop	First Name	M.I.	Last Name	D.O.B.	Sex	Social Security #		

*For any new dependents we MUST get copy of SS Card (*Possibly Birth Certificate*) *Drops-Note reason for not claiming!

Banking/Financial Questions & Direct Deposit/Debit Information ☐

❒ Yes ❒ No DID you have any financial interest in any virtual currency/cryptocurrency in 2021?*(Bitcoin, Litecoin, Ethereum, etc)*

❒ Yes ❒ No ❒ Unsure (Don't Understand) DO YOU have access to any out-of-country bank accounts?

❒ Yes ❒ No *Do you have Immediate Family/Close Relatives living in a Foreign Country?

❒ Yes ❒ No *Are you Power of Attorney for anyone living outside the US?

❒ Yes ❒ No DO you want to Direct Deposit your *TAX REFUND* ?

***We strongly recommend electronic payments if you owe tax instead of mailed checks/payments.**

❒ Yes ❒ No DO you want to Direct Debit/Withdrawal your TAX DUE if ***less than $100*** ?

❒ Yes ❒ No DO you want to Direct Debit/Withdrawal your TAX DUE if ***more than $100*** ?

❒ Yes ❒ No DO you want information on other Electronic Methods to pay your tax?

Bank Name: ____________ Bank Routing #: ____________

❒ See attached check Account #: ____________ CHECKING or SAVINGS

Is the Account: Joint Taxpayer Spouse Verification Signature: ____________

New "HOTSPOT" Items for 2022!

☐ ***Check the box if you have ANY crypto currency, digital assets or EFT's*** ☐

*****Please bring paperwork detailing ANY purchase, sale, award, reward, gift or exchange of the above !***

☐ ***Check the box if the IRS has issued you an IP (Identity Protection) PIN !*** ☐

You MUST provide us with IRS Notice CP01A that IRS mailed in January 2023 to be able to file your tax return!!!

❒ Yes ❒ No Did you receive any Unemployment in 2022? *Please provide form(s) UC-1099G and/or PUA-1099G!!!* ☐

❒ Yes ❒ No Did you have PENNIE health insurance at anytime in 2022? ***You MUST PROVIDE ALL 1095-A's!!!***

❒ Yes ❒ No Did you have an HSA (Health Savings Account) at anytime in 2022? [PLEASE SEE BELOW] ☐

**You must provide form(s) 5498-SA & 1099-SA! You may have to log into your online account portal to access & print these!*

❒ Yes ❒ No Did you make a Qualified Charitable Distribution (QCD) from your IRA in 2022? ☐

❒ Yes ❒ No Did you have any Child Daycare expenses in 2022??? [SEE BOTTOM OF NEXT PAGE!] ☐

**You can use these expenses on your PA Tax Return for the 1st time ever-complete the details & provide receipts!!!*

❒ Yes ❒ No Did you have any College Tuition or Student Loan Interest in 2022? [SEE BOTTOM OF NEXT PAGE!] ☐

**Please provide Forms 1098-T & 1098-E *You may have to log into online accounts / portals to access & print these!*

ITEMIZED DEDUCTIONS WORKSHEET

You can itemize your deductions on Schedule A ("going Long Form") if expenses exceed the standard deduction:

Single - $12,950, Married filing jointly - $25,900, Head of Household - $19,400

MEDICAL

****Expenses must exceed 7.5% of your adjusted gross income!!!* ☐

NOTES:

If you had health insurance coverage during any part of the year through the Gov't Marketplace/Healthcare.gov/Pennie/"Obamacare" YOU MUST PROVIDE *ALL 1095-A's*

HSA

❒ Yes ❒ No **Do you have an HSA (Health Savings Acct)?** ❒ *Self/Individual* ***or*** ❒ *Family*

How many months did you have a High Deductible Health Plan? ________

Did you make any HSA contributions outside of payroll? ❒ Yes-$ Amt ______________ ❒ No

Any HSA Distributions? ❒ Yes-was it ***ALL*** used for medical expenses? Y / N ❒ No

YOU MUST** provide ALL ***5498-SA for any contributions & ALL ***1099-SA*** for ***ANY*** distributions

Doctors, dentists, nurses, hospitals .... ________

Prescription medicines, drugs & insulin .... ________

Health Insurance premiums (Post Tax Only-bring paystub if unsure) .... ________

Miles traveled for medical care (plus parking, tolls, and fares).................... ________

Long Term Care Insurance premiums - husband - __________ & wife - __________

Other: (hearing aids, dentures, eyeglasses, chiropractors, etc...) .... ________

**Medical Expenses are deductible in the tax year PAID-regardless of when service was provided!*

**** For detailed list of valid medical expenses check out "Medical Expense Deductions" on the "Resources" page of Sonrisetax.com!***

TAXES

☐

NOTES:

Did you make any large purchases last year that you **did not** pay PA sales tax on? ❒ No ❒ Yes*

Online or Out-of-State Purchases (electronics, gifts, appliances, etc) *If yes list item and amount

Sales Tax Paid on large purchases, vehicles & boats.............................. ________

Occupation Privilege Taxes, LST, etc. ________

School, county, & local real estate tax (Spring & Fall taxes) ________

Real Estate Taxes Escrowed? Y / N ❒ See Attached Mtg Docs/1098's etc.

SENIORS MUST BRING REAL ESTATE TAX BILLS STAMPED PAID TO APPLY FOR REBATE!!!

INTEREST PAID

☐ *See Attached Mtg Docs/1098's etc.* ☐

NOTES:

Home mortgages (banks and lenders - Form 1098) please bring documents... ________

Home equity loan (RVs, vacation homes, etc).. ________

____

Interest paid to maintain investments .... ________

***If you bought, sold or refinanced your home, please bring the settlement sheet(s)!**

CHARITABLE CONTRIBUTIONS ☐ See Attached List / Receipts ☐

NOTES:

★ If you made a ***Qualified Charitable Distribution*** (*QCD*) from your IRA-**Please let us know!!!**

Cash or check contributions(church, etc.-***must have bank records or receipts***) ________

(For a single gift of $250 or more you MUST have signed receipt *prior to filing*!)

**** If you DO NOT have proper records and receipts, IRS WILL DISALLOW them!!!***

Noncash (food, furniture, clothing, property to charitable organizations) ________

**(If "Noncash" exceeds $500, please include detailed list of charity, date, items & dollar value).

Travel for charity (Boy Scouts, Little League, church, etc..) # of miles ________

**For more detail check out the "Charity Deductions" guide on the "Resources" page of *Sonrisetax.com*

EMPLOYEE/JOB EXPENSE DEDUCTIONS ☐

NOTES:

(IRS-NO LONGER DEDUCTIBLE : *PA-must exceed $1,000)

**** PA will ask for records, receipts, and letters from employers in MANY cases!***

Union Dues ……………………………………………………………………….. ________

Teacher/Educator Expenses *(Non-Reimbursed Classroom Supplies/Expenses)* ________

Professional Dues & Licenses (Realtor, LPN/RN, Barber/Beautician, Mechanic, etc.)… ________

Continuing Education (Must apply to current Job OR be required by employer or law)…. ________

Liability/Malpractice Insurance OR Medical Exams Required by Employer…. ________

Work Uniforms/Nurse Whites *(required by employer & NOT suitable for ordinary wear!)* ________

**NO Jeans, T-shirts, socks, or general clothing unless logo'd/embroidered… ________

Laundering Uniforms above……………………………………………….…………… ________

Safety Equip,Tools & Supplies *(steel tips, gloves, glasses, hard hat, flashlights, etc.)* ________

EMPLOYEE TRAVEL EXPENSES- ***YOU MUST have Mileage/Expense LOGS with receipts!!!***

****If you had any temporary job travel, lodging and/or meal expenses-Please let us know!!!***

MISCELLANEOUS DEDUCTIONS ☐

Gambling Losses-***Only Deductible*** up to $$$ of Winnings Reported as Income! ____________

CASUALTY & THEFT LOSSES ** Generally must be greater than 10% of your income* ☐

*Generally the loss must occur in a Federally-declared disaster area (www.fema.gov/disasters)

Retirement Contributions ☐

Taxpayer: ❒ Traditional IRA $__________ ❒ ROTH IRA $__________ ❒ Payroll ONLY (401k, 403b etc)

Spouse: ❒ Traditional IRA $__________ ❒ ROTH IRA $__________ ❒ Payroll ONLY (401k, 403b etc)

❒ Other Retirement Plans/Contributions: ______________________________

Other Adjustments, Deductions & Credits

DAYCARE/CHILDCARE EXPENSES: ❒ **YES** ❒ **NO** ❒ **See attached Reciept** ☐

Need Name, Address, and ID#/Social Security # of Provider: ______________________________

List Name & $$$ Amount for *EACH* Child:	Child's Name:	$
	Child's Name:	$

COLLEGE / EDUCATION EXPENSES: ❒ **YES** ❒ **NO** ☐

❒ **Tuition:** MUST provide Form 1098-T* & Proof of Tuition PAID-***WE NEED*** a Financial Transcript from the institution!

❒ **Student Loan Interest:** Please Provide Form 1098-E* ____________

* Generally these forms go to the student & are increasingly only accessible online through a website or Student Account!!!

Any TAP 529 / Education Account Contributions or Distributions? ❒ **Yes** ❒ **No**

❒ **Contributions-**We must know how much and for who *(Name, Relation, SSN)* ____________

❒ **Distributions-**We must have 1099-Q *& information on how it was spent/allocated to college expenses* ____________

Do You Need Data or a Worksheet for completing the FAFSA Application? ❒ **Yes** ❒ **No**

ADOPTION CREDIT/EXPENSES: ***Must provide Documentation of Decree, Expenses, SS Card & DOB!*** ☐

OTHER POSSIBLE DEDUCTIONS OR QUESTIONS:

Description	Amount	***QUESTIONS????***

What Do I Need For My Taxes?

One of the best ways to prepare and organize your "stuff" is to pull out last years tax return packet to refresh & review everything from last year. Next, gather all the documents you receive, including anything labeled *"Important Tax Information"*, and review them for accuracy before bringing them to Sonrise. Then, visit *Sonrisetax.com* and review our *"Meeting With Us"* & *"Resources"* pages for the most up to date information. Lastly, print & complete our *Tax Organizer* to make sure you don't miss anything! The best way to get a complete & accurate tax return filed by Sonrise in an efficient & timely manner is to provide your completed *Tax Organizer* & ALL your gathered documents, forms & materials in one visit!

IRS is still very backlogged and not back to "normal" so... *"IRS encourages everyone to have all necessary information in hand to make sure they file a complete and accurate return. Having an accurate tax return can avoid processing delays, refund delays and later IRS notices". As a reminder "By law, IRS can't issue Earned Income Tax Credit (EITC) or Advanced Child Tax Credit (ACTC) refunds before mid-February. This includes your entire refund, not just the part that's related to the credit you claimed on your tax return. Additionally, IRS cautions taxpayers NOT to count on getting their refund by a certain date to make major purchases or pay bills. Even though the IRS issues most refunds in less than 21 days, it's possible your tax return may require additional review and take longer.*

What Forms or Things Should I Bring ????

COMPLETED TAX ORGANIZER!!! SONRISETAX.COM

ALL NEW CLIENTS MUST PROVIDE A COPY OF LAST YEARS TAX RETURN!!!

New Client??? We need to copy SS Cards for everyone on the tax return & Drivers License/ID for all ADULTS.

If you have an Identity Protection (IP) PIN - Please provide the CP01A Notice IRS sent you in the mail.
If you have ANY digital currency, assets or EFT's bring paperwork detailing any purchases or sales!
If you have Health Insurance through PENNIE - You must provide us with your 1095-A to complete your taxes!
If you have a Health Savings Account (HSA) be sure to print out any 1099-SA or 5498-SA Forms from your portal/acct.
If you donated any portion of your IRA RMD (Required Minimum Distribution) directly to charity please make us aware!
If you or a dependent student has college tuition-You must provide Form 1098-T or a payment transcript (check online!)
If you have student loan interest-please provide the amount & any Form 1098-E's (print them from your online account!)
★ We always advise clients to directly deposit any tax refunds into their bank account & NOW we strongly encourage ALL clients to have any tax owed directly debited from their bank accounts due to USPS delays & concerns!

- Wage Documents: W-2 and 1099-MISC/1099-NEC forms
- Investment Income: 1099-INT, 1099-DIV & 1099-B forms
  *Purchase Date & Price for Stocks Bought & Sold
- Unemployment Statement: UC-1099G & PUA-1099G
- Retirement, Pension, & Annuity Income: 1099-R forms
- Social Security Statement: 1099-SSA
- Gambling/Lottery/Prize Winnings & Losses: W-2G
- Foreclosure/Cancellation of Debt: 1099-A and/or 1099-C
- Estate or Partnership Income: Schedule K-1
- Business, Farm, & Rental Income Docs-see below
- 1099-K for Internet or Credit Card Sales
- Other Misc Inc. (Jury Duty, Hobby, etc): 1099-MISC/1099-NEC
- Blank/VOIDED Check (for Direct Deposit/Debit information)
- Health Insurance Doc's Including 1095-A, B, C
- HSA Policy (If you have one) 1099-SA / 5498-SA
- College tuition payment record & any *1098-T* forms
- Student Loan Interest and any 1098-E forms
- Educational or work-related expenses (See Organizer)
- Child care expense-Name, Address & ID# of Provider
- Alimony Income/Paid Record (*Need date of Divorce*)
- Settlement Sheets--Purchase or Refi of *ANY* Property
- Mortgage/Home Eq/LOC Interest (Form 1098)
- Real Estate Taxes (MUST be *stamped paid* for Rebate
- Charitable Contribution Summary/Receipts
- Your Estimated Payment Records/Envelope for 2022
- Estimated Tax Vouchers - State & Local

ANY NEW DEPENDENTS???? Please provide Social Security card and Birth Certificate!

MILITARY PERSONNEL: MILITARY ORDERS ARE NEEDED FOR ALL ACTIVE DUTY!!!

Business Information Needed: (If you operate your own business)

#1-Total income received for sales and/or services	#2-Expenses subtotaled by category

Health Insurance Premiums for Private/Self-Employed Plans (1095-A if on Pennie.com/"Obamacare")

List Overall Mileage & Business Mileage for any vehicles used for business *(2023 Mileage Rate will be 65.5 cents/mile)*

2022 Mileage Rate was split - 58.5 cents per mile (Jan-June) & 62.5 cents per mile (July-Dec)

For large items (depreciable) we need cost, purchase date & description

Notes for Independent Agents/Distributors of Larger Companies:

(ex: Mary Kay, Tastefully Simple, Jamberry, Pampered Chef, Avon, Thirty-One, Origami Owl, Paparazzi etc.....)

Your company's record keeping is usually complex and not designed for tax purposes-their definition of profit is different than the IRS's.

We recommend you give us the total of all money *YOU* received through your business (commissions & customer payments) and the expenses that you actually paid by cash, check, or credit card. Keep it simple!

Landlords, Farmers, Business Owners, & Day Care Providers

Please checkout the plethora of information on our website - Sonrisetax.com/resources

It just may help you find those few extra deductions and answer some of those nagging questions.