

2022

TAX ORGANIZER

PLEASE USE THIS FORM TO ASSIST WITH GATHERING OF INFORMATION FOR YOUR 2022 TAX RETURN

Taxpayer: _____

Taxpayer date of birth: _____

Taxpayer occupation: _____

Email _____

Spouse: _____

Spouse date of birth: _____

Spouse occupation: _____

Email _____

Address: _____

City, Village or Town: _____

County: _____

Telephone #: _____

Dependents	SS#	Date of Birth
_____	_____	_____
_____	_____	_____
_____	_____	_____

Direct deposit of refund: Yes No

Bank Name: _____

Bank Routing Number: _____

Account Number: _____

Savings Checking

Do you rent: Yes No

Rent paid: _____

With heat Without heat

Tuition Expense:

Name	Amount	Yr	School
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Pension Contributions (other than at work):

IRA – taxpayer _____

IRA – spouse _____

Roth IRA – taxpayer _____

Roth IRA – spouse _____

Educator expenses: _____

Itemized Deductions:

Medical:

Doctors _____ Hospitals _____

Medications _____ Glasses _____

Hearing aids _____ Mileage _____

Other _____

Taxes paid:

Real Estate:

Home _____ Cottage _____

Personal property taxes _____

Interest paid:

Mortgage:

Lender	Amount
_____	_____
_____	_____
_____	_____
_____	_____

Donations: (must have receipt or cancelled check or both)

Non cash contributions:

Gambling winnings _____

Unemployment _____

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W2's

Enclose all W-2's from each employer or Form 1099 if you were a sub-contractor

Do you have an HSA through your Employer? _____

HSA Contribution you paid other than by deduction from your paycheck

Interest income

Enclose all 1099's received for interest earned

Dividend income

Enclose all 1099's or broker statements for all dividends and stock transactions for the year

Pension plan withdrawals

Enclose al 1099-R's received for pension distributions received

Social Security Received

Taxpayer _____ Spouse _____

K-1's

Rental income

Other income not listed above

Jury pay _____
Tribal payments _____

