

Client Tax Organizer - Tax Year 2022

1. Personal Information / Update as needed

	<u>Taxpayer 1</u>	<u>Taxpayer 2</u>
First Name (REQUIRED)		
Last Name (REQUIRED)		
Soc Sec #		
Date of Birth		
Occupation		
Email Address (please list)		
Mobile Phone (please list)		
Home Phone		
Street Address	New[]	New[]
City, St, Zip		

For your return copy, Select 1 Paper or PDF

Please answer all questions to help determine best tax outcome.

1. As of 12/31/22, what is your marital status?	<input type="checkbox"/> Single	<input type="checkbox"/> Married	<input type="checkbox"/> Legally Separated
2. Did your bank info for Direct Deposit change?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
3. Any change in dependents? Provide details, if yes.	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
4. Purchase, sell or re-fi your home? If yes, circle any that apply.	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
5. Did you/spouse receive unemployment or disability?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
6. Did you pay for child care services?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
7. Did you pay Tuition/Education expenses? Provide 1098T	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
8. Did you gift more than \$16,000 to anyone in 2022?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
9. Did you have assets/accounts in a foreign country?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
10. Did you make online purchases without paying sales tax?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
11. Any months withOUT ACA Compliant Health Ins?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
Provide Form 1095A, 1095B, or 1095C. If you had Covered CA we require the Fed and State 1095-A Forms			
12. Did you buy or sell any Virtual Currency? Provide statement if sold any.	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
13. Any Retirement Contributions or Distributions?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
14. Convert any of your Traditional IRAs to a ROTH IRA?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
15. Buy or sell stocks, bonds or investments?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
16. Did you make any energy efficient improvements?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
17. Any MSA, HSA, or LTC Contributions or Distributions? Provid forms, if yes.	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
18. Receive notices from IRS or State for changes or audit of returns?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
19. May the IRS discuss the completed return with Toshiye, if needed?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
20. Did you receive \$600 or more in payments/income via Venmo, CashApp, or other similar services?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	

Please provide copies of all tax forms.

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