



PLEASE COMPLETE BOTH SHEETS  
If you need more space, use back of the sheet

**PERSONAL INFORMATION**

(T) TAXPAYER \_\_\_\_\_ Social Security # \_\_\_\_\_  
 (S) SPOUSE \_\_\_\_\_ Social Security # \_\_\_\_\_  
 Street Address \_\_\_\_\_  
 City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_  
 Phone: Home \_\_\_\_\_ (T) Cell \_\_\_\_\_ (S) Cell \_\_\_\_\_  
 (T) Occupation \_\_\_\_\_ Birthdate \_\_\_\_\_ E-mail \_\_\_\_\_  
 (S) Occupation \_\_\_\_\_ Birthdate \_\_\_\_\_ E-mail \_\_\_\_\_

DEPENDENTS (All Information Required) Name (first, initial and last name)	Dependent's Social Security Number	Birthdate	Relationship	No. of mos. lived in your home in 2022

- Is Direct Deposit the same as last year? Yes \_\_\_\_\_ No \_\_\_\_\_ Please bring new bank info.
- Did you trade in Cryptocurrency? Yes \_\_\_\_\_ No \_\_\_\_\_
- Did you purchase health insurance through the marketplace? Yes \_\_\_\_\_ No \_\_\_\_\_ If yes, please bring form **1095A**.
- Did you purchase an energy-efficient Car, Truck or Van? Yes \_\_\_\_\_ No \_\_\_\_\_
- Did you make energy-efficient home improvements? Yes \_\_\_\_\_ No \_\_\_\_\_
- Did you receive a 1099-C Cancellation of Debt? Yes \_\_\_\_\_ No \_\_\_\_\_
- Do you have an interest in or other authority over a bank account or any other financial account in a foreign country? Yes \_\_\_\_\_ No \_\_\_\_\_
- Did you have any online purchases that you did not pay Colorado State Sales Tax? Yes \_\_\_\_\_ No \_\_\_\_\_ If yes, please total amount purchased.
- Applies to 65 and older, did you receive the Homestead Exemption on your property tax bill? Yes \_\_\_\_\_ No \_\_\_\_\_
- May the IRS discuss your return with the preparer? Yes \_\_\_\_\_ No \_\_\_\_\_
- box if you want \$3 to go to the Presidential Campaign Fund?  Taxpayer  Spouse

**INCOME - Please bring all W-2's, 1099's, K1's and any statements regarding income.**

Please X items you have and bring forms and/or provide amounts

# of W-2's you have from Employment (T) \_\_\_\_\_ (S) \_\_\_\_\_

- Interest from banks & credit unions \_\_\_\_\_
- Interest on Life Insurance \_\_\_\_\_
- Interest from Municipal Bonds \_\_\_\_\_
- Interest from Seller Financed Mortgage \_\_\_\_\_  
(Bring Payer's name, address & SS #)
- Dividends from Stock \_\_\_\_\_
- Soc. Sec. Benefits Rec'd (T) \_\_\_\_\_
- Soc. Sec. Benefits Rec'd (S) \_\_\_\_\_
- State Refund \_\_\_\_\_
- Unemployment Income \_\_\_\_\_
- Pension, Annuity Income \_\_\_\_\_
- IRA Distribution \_\_\_\_\_
- Rollover into IRA \_\_\_\_\_
- Prizes, Awards \_\_\_\_\_
- Gambling Winnings (W-2G) \_\_\_\_\_
- Jury Duty \_\_\_\_\_
- Tips \_\_\_\_\_
- Alimony Received \_\_\_\_\_  
Divorce Prior to 12/31/18
- Investments Sold** (Bring 1099-B) \_\_\_\_\_  
(Date Acquired/Sold, Original Cost & Sales Priced needed if not reported on 1099B)
- Real Estate Sale** (Bring date of purchase, purchase price, improvements made & closing papers) \_\_\_\_\_
- Real Estate Purchase** (Bring closing papers) \_\_\_\_\_
- Real Estate Refinance** (Bring closing papers) \_\_\_\_\_
- Self-Employment Income** (Bring income & expenses and/or Financial Statements) \_\_\_\_\_
- Partnership Income** (Bring K-1) \_\_\_\_\_
- Corporation Income** (Bring K-1) \_\_\_\_\_
- Trust Income** (Bring K-1) \_\_\_\_\_
- Rental Income** (Bring income & expenses) \_\_\_\_\_  
See website for Rental Worksheet
- Bartering Income** \_\_\_\_\_
- List Any Other Income** \_\_\_\_\_

Name \_\_\_\_\_

### IRA

#### Traditional IRA Deposits

	Date Deposited	Tax Year	Amount
(T)			
(S)			

#### Roth IRA Deposits

	Date Deposited	Tax Year	Amount
(T)			
(S)			

#### Regular IRA Converted to Roth IRA

(T)			
(S)			

### Alimony

Amount \_\_\_\_\_  
Paid To \_\_\_\_\_  
SS # \_\_\_\_\_  
Divorce Final Prior to 12/31/2018

### Work Related Childcare

List on back of worksheet:  
Name, Address, SS#, EIN & Amount Paid to Each Child Care Provider.  
\_\_\_\_\_  
List Amount Your Employee Reimbursed You in 2022 \$ \_\_\_\_\_

### Education

#### 529 & Coverdell Plan Deposits

Name & SS# of Acct. Holder	Tax Year	Amount

Student Loan Interest Paid (bring 1098E)	
Tuition Expense (bring 1098T) & Billing Summary	
Book Expenses	
Room & Board	

### Medical Expenses

After Tax Medical & Dental Insurance Premiums You Paid (please do not include Medicare premiums on SSA) \_\_\_\_\_  
\_\_\_\_\_  
Long-Term Care Ins. Prem (T) \_\_\_\_\_  
Long-Term Care Ins. Prem (S) \_\_\_\_\_  
Medical Bills Not Reimbursed by Insurance:  
Prescriptions & Insulin \_\_\_\_\_  
Doctors \_\_\_\_\_  
Dentists \_\_\_\_\_  
Hospital \_\_\_\_\_  
Mental Health) \_\_\_\_\_  
Glasses & Contacts \_\_\_\_\_  
Other: \_\_\_\_\_  
\_\_\_\_\_  
Miles Traveled for Medical \_\_\_\_\_  
Your Deposits to Health Savings Account (HSA): \_\_\_\_\_  
\_\_\_\_\_  
Distribution from HSA \_\_\_\_\_

### Taxes

Real Estate \_\_\_\_\_  
\_\_\_\_\_  
Owner's Tax \_\_\_\_\_  
Sales Tax (New Auto) \_\_\_\_\_

### Interest You Paid

Home Mtg. Interest Paid to Financial Institutions \_\_\_\_\_  
\_\_\_\_\_  
Home Mtg. Interest Paid to Individual (Name, Address, SS#) \_\_\_\_\_  
\_\_\_\_\_  
HELOCK Loan Interest, only if used to buy, build or improve main home \_\_\_\_\_  
Refinance Points Paid \_\_\_\_\_  
Motor Home Interest Paid \_\_\_\_\_

### Contributions

Church \_\_\_\_\_  
United Way \_\_\_\_\_  
Other Qualified Donations \_\_\_\_\_  
\_\_\_\_\_  
Fair Market Value of Goods Donated (See Website for Guidelines)  
Salvation Army \_\_\_\_\_  
DAV \_\_\_\_\_  
Goodwill \_\_\_\_\_  
Other \_\_\_\_\_  
Miles Driven for Charity \_\_\_\_\_  
**Must have receipts for all donations.**

### Gambling Losses

Bring W-2 G Forms \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

### Estimated Taxes Paid

FEDERAL				STATE	
	Due	Date Paid	Amount	Date	Amount
1st QTR	April		\$		\$
2nd QTR	June		\$		\$
3rd QTR	Sept		\$		\$
4th QTR	Jan 2023		\$		\$