

# 2022 Individual Taxpayer Organizer

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**Please complete all sections of the organizers so we can ensure we have current information , even if there is no change.**

<b>Taxpayer</b>				SSN	
<i>First</i>	<i>M.I.</i>	<i>Last</i>	Email	<i>IP PIN</i>	
Occupation		Date of birth <small>MM/DD/YYYY</small>	Are you new to our firm? Yes No		
Address		City	State	Zip	
County		Home phone		Work or cell	
Driver's License	No.		State	Issue Date	Exp. Date

<b>Spouse</b>				SSN	
<i>First</i>	<i>M.I.</i>	<i>Last</i>	Email	<i>IP PIN</i>	
Occupation		Date of birth <small>MM/DD/YYYY</small>	Are you new to our firm? Yes No		
Address <small>(If different from Taxpayer)</small>		City	State	Zip	
County		Home phone		Work or cell	
Driver's License	No.		State	Issue Date	Exp. Date

Do you have an IRS Identity Protection PIN as a result of Identity Theft? Yes No Do you rent or own your home? Own or Rent

If you moved during 2022, enter your previous address. Date of move

**State information:** States of residence during 2022 and dates From \_\_\_\_\_ to \_\_\_\_\_ MM/DD/YY

School district \_\_\_\_\_ County \_\_\_\_\_

Marital status at 12/31/2022 Single Married Separated Widow(er) Registered Domestic Partnership (RDP) Unsure

Were you divorced or separated during the year? Yes No Were there any deaths in the family? Yes No

Individuals who are in registered domestic partnerships (RDPs) and civil unions are not considered married for federal tax purposes.

Have you received any notice from the IRS or state revenue department within the past year? Yes No

Names of dependent children <small>Child's full name</small>	Social Security #	IP PIN	Date of birth <small>MM/DD/YYYY</small>	Months lived in home in 2022	Relationship	College student?

Other dependents or people who lived with you	Social Security #	IP PIN	Date of birth <small>MM/DD/YYYY</small>	Months lived in home in 2022	Relationship	Income

Is it anticipated that a different taxpayer will seek to claim a child listed above as their dependent for tax year 2022? Yes No

Do any of the children have a disability? Yes No

Did any of the children have any income above \$1,150 for the year? Yes No

**Questions - All Taxpayers** (Provide related statements or other documentation.)

"You" refers to both taxpayer and spouse - enter "?" If unsure about a question.

<b>LIFESTYLE &amp; HEALTH</b>	Yes	No	Are either you or your spouse legally blind?
	Yes	No	Did you pay or receive alimony during the year? Paid / Received \$ _____
			Recipient's SSN _____ Provide copy of Divorce Decree
	Yes	No	Are you currently a member of the military or Retired military? State of residency _____
	Yes	No	Did you purchase health insurance through the Government Marketplace? Form 1095-A ( <b>REQUIRED</b> )
	Yes	No	Did you contribute to a Health Savings Account (HSA) during the year? If yes, provide Form 1099-SA and contribution amounts.
	Yes	No	Did you, or do you plan to contribute additional money to your HSA before 18 April 2023 for 2022 ?
	Circle One		Is the HSA account a Family plan or Individual Plan ( <b>Circle one</b> )
			How many months did you participate in the HSA during the year? _____
	Yes	No	Do you have federal debt which is overdue, being collected, and is the responsibility of only one spouse?
	Yes	No	Did anyone in the household receive unemployment income during the year? If yes, provide 1099-Gs
	Yes	No	Did you pay anyone for domestic services that you hired directly and does not have their own business? (If yes, complete the Household Domestic Worksheet).
	Yes	No	Are you involved in bankruptcy, foreclosure, or repossession?
	Yes	No	Did you have any debt cancelled during the year? (includes credit cards, car loans, etc)
	Yes	No	Will there be any signifiant changes in income or deductions next year, such as retirement? Divorce?
Yes	No	Did you provide any type of Gifts to any person (not a charity) during the year in excess of \$16,000? (this includes cash, assets or partial interest in property) If yes, please provide details	
Yes	No	Do you anticipate Itemizing your deductions? (Mortgage Interest, property taxes, charity..etc) - complete Itemized worksheet	
<p>The below options are for limited communication only and do not provide or allow Steadman Tax Services to represent you as your Power of Attorney with the IRS. If you need IRS representation for IRS issues, this would be covered under a separate engagement.</p>			
Yes	No	Would you like us to communicate with the IRS for this specific tax return if there are any issues regarding payments or refunds only?	
Yes	No	Would you like us to communicate <b>and receive</b> IRS confidential information directly from the IRS for multiple tax years?	
<b>FOREIGN</b>	Yes	No	Were you a citizen of <b>OR</b> lived in a foreign country? Foreign Country _____
	Yes	No	Did you have any accounts or assets outside the USA during the year? (Includes online, physical, virtual accounts, Pension, Trust, and Annuities, Real Estate, provide details) Value of account or FMV of assets _____.
	Yes	No	Did you receive a distribution from, or were you the grantor of, or transfer to, a foreign trust?
<b>CHILDREN &amp; EDUCATION</b>	Yes	No	Were any children born or adopted during the year? If yes, provide birth certificates, social security cards and adoption records.
	Yes	No	Did you pay any college tuition for a child, a dependent, or yourself during the year? If yes, complete the <b>Education Worksheet</b> .
	Yes	No	Did you pay for child or dependent care so you could work or go to school? (provide statement from provider with Tax ID, amount and address)
	Yes	No	Did you pay any student loan interest during the year? If yes, provide Form 1098-E.
	Yes	No	Do you have any children who had more than \$1,150 of gross investment income for the year?
	Yes	No	Did you make any contributions to a 529 plan during the year? If yes, please provide details.
	Yes	No	Did you take any distributions from a 529 plan during the year? Please provide Form 1099-Q.
	Yes	No	Have you paid alternative minimum tax (AMT) in previous years? If yes, please explain type and year(s).



## Dependency Worksheet

*(complete if claiming children, parents or other individuals as a dependent, use additional sheets as necessary)*

Taxpayer Name: \_\_\_\_\_ Spouse Name: \_\_\_\_\_

List complete names of each dependent (child, parent, or other dependent) claimed on your return. Use additional sheets as necessary.

Is each dependent a U.S. Citizen, U.S. National, or U.S. Resident Alien? Yes No Yes No

Relation of each dependent (if adopted, please provide dates) \_\_\_\_\_

How many months (or days) did each dependent reside in your home? \_\_\_\_\_

**(see note1)** \_\_\_\_\_

Total income received by dependent (including Social Security, investment, and other income) \_\_\_\_\_

Did you provide more than half the support for the dependent for the entire year? Yes No

Are you, or spouse, self-employed or receive any income from services or jobs you perform. (includes ride share, delivery, or other income producing activities) Yes No

1. Were all children claimed on this year's return natural born to both parents listed on this return, and no divorced or separated parents situation, or other claims to dependency applies? Yes No or NA

2. Can you provide documents to support your answer if requested by the IRS? (school or medical records showing residence of dependent) Yes No

3. Have you ever been denied earned income credit or child tax credit in the past? Explain. Yes No

4. Are you filing as Single or Head or Household? (Married filing jointly circle "no") Yes No

**If dependent is your parent, or children and you answered "YES" to 1 and 2, and "NO" to 3 and 4 above, STOP HERE and sign the bottom.**

Is the dependent a qualifying child of another taxpayer? **(see note2)** Yes No Yes No

If yes, please list who \_\_\_\_\_

Which parent has the highest adjusted gross income? \_\_\_\_\_

If child did not live in your home for the entire year, do you have a Form 8332 signed by the custodial parent? Yes No Yes No

If child resides in your home, did you release the custody to another parent for the year to allow them to claim the child? Yes No Yes No

Please provide a copy of school, daycare records, or other equivalent document with child's name and same address. (type of record) \_\_\_\_\_  
(type of record provided) (type of record provided)

**Note 1:** Child must live with taxpayer for more than half the year. If child lives with both parents who are separated, then the custodial parent is determined by the number of days (nights) at each parents house. If child lives with parents equally, the IRS will treat the child as the qualifying child of the parent who had the higher adjusted gross income for the year

**Note 2:** Qualifying child of more than one person: Even if a child meets the conditions to be the qualifying child of more than one person, only one person can claim the child as a qualifying child for all of the following tax benefits, unless the special rule for Children of divorced or separated parents applies:

- |                                    |   |
|------------------------------------|---|
| 1. Dependency exemption            | 4. Credit for child and dependent care expenses |
| 2. Child tax credits               | 5. Exclusion for dependent care benefits        |
| 3. Head of household filing status | 6. Earned income credit                         |

\_\_\_\_\_  
 Taxpayer's Signature Date Spouse's Signature Date

## Estimated Tax Payments—Tax Year 2022

(Include payments made for 2022 Taxes, not 2021 balance due or payments on prior years balances)

Please provide the following documentation: *Date paid* MM/DD/YYYY *Federal (amount)* *Date paid* MM/DD/YYYY *State (amount)*

First		\$		\$
Second		\$		\$
Third		\$		\$
Fourth		\$		\$
Amount applied from 2021 overpayment?		\$		\$
Total		\$		\$

## Tax Preparation Checklist (list of most common forms, not all inclusive)

Signed Engagement Letter  
Completed Individual Organizer (this form)

All Forms W-2 (wages) (please make sure to include all W2s especially if you changed jobs and may have a small one from the beginning of the year)  
1099-G (unemployment)  
1099-INT (interest)  
1099-DIV (dividends)  
1099-R (pensions and IRA distributions)  
SSA-1099 (Social Security Income or Social Security Disability Income)  
1099-B (proceeds from broker or barter transactions),  
Schedules K-1 from partnerships, S corporations, Estates and Trusts,  
1099-NEC and 1099-MISC Forms from any jobs whether full time or part-time, even Uber or other Gig Economy sources  
1095-A (health insurance purchased through the marketplace like healthcare.gov)

Additional worksheets if applicable:

Itemized worksheet (includes state and local taxes, mortgage interest, charity..etc)  
Education worksheet  
Daycare information  
Sole Proprietor worksheet  
Rental worksheet  
Closing statements from sale or purchase of main home, vacation home, rental homes, or investment property.

If you are a new client, provide copies of last year's tax returns.