

PLEASE BRING YOUR W-2's, 1099's, and All Other Documentation

**Please keep all receipts/documents
in the event you are audited**

ABC Bookkeeping & Tax Services, Inc.

**A.J. REYNOLDS, EA
ABCTaxEA@aol.com**

**507 7th Street, Suite 230, Insurance Centre
Sioux City, Iowa 51101**

**Phone 712-255-7617
Fax 712-255-7618**

Taxpayers Names		Birthdate	Occupation	Phone Number
You				
Spouse				
Address				
Dependent Name		DOB	Relationship	
Taxpayers Driver's License No.		State	Issue Date	Exp. Date
Spouse Driver's License No.		State	Issue Date	Exp. Date

INCOME		OTHER INFORMATION			
Wages-W2's-Pensions/IRA's, 1099-R's		Unemployment Compensation			
Partnership/S Corp. - Attach K-1's		Gambling-See Question 11&12,Pg 2			
Social Security Rcvd - 1099SSA		IRA's/SEP's, et. al. Contribution			
Interest - Bring All 1099's INT.		Alimony Paid or Received			
Dividends - Bring All 1099's DIV.		Moving Expense-Attach Schedule			
Stock Sales - Attach Schedule		ESTIMATED TAXES:			
Rental Inc./Exp. - Attach Schedule		1st Qtr	2nd Qtr	3rd Qtr	4th Qtr
Self Employment Inc./Exp. - Attach Sch		Federal			
Farm Inc./Exp. - Attach Schedule		State			
Other Inc./Exp. - Attach Schedule					

ITEMIZED DEDUCTIONS		CONTRIBUTIONS - Must Have Receipts!	
MEDICAL		Church's	
Health Insurance (Non Medicare)		Other Check & Cash Contributions	
Medicare Insurance Premiums		Non Cash Contributions	
Long Term Care Insurance		Volunteer/Charity Mileage	
Health Savings Account (HSA)			
Prescription Drugs			
Doctors & Dentists			
Hospital Expense			
Nursing Home/Asst Living Expenses			
Medical Travel (# of miles)			
Eyeglasses/Hearing Aids			
Other Medical - Attach Schedule			
		MISCELLANEOUS	
TAXES		Union Dues	
Real Estate Tax		Employee Bus. Exp.-Attach Sch.	
		Safe Deposit Box	
		Investment Fees	
		Casualty/Theft Losses	

INTEREST PAID OUT		IOWA RESIDENTS ONLY	
Mortgage(s) on Home		Charity Mileage	
Mortgage on 2nd Home		Tuition & Textbook Expenses, K-12	
Student Loan Interest			
Investment Interest			

ENERGY CREDITS ON PRINCIPAL RESIDENCE	
Description	\$ Amount
Geothermal Heat Pumps	
Windows, HVAC	
Solar Panels	
<i>Must have Manufacturer's Tax Credit Certification Statement</i>	

TAX REFUND - DIRECT DEPOSIT INFORMATION - Complete to Ensure we have Update/Correct Data			
Checking/Savings	Bank Name	Routing Number (9 digits)	Account Number

HEALTH INSURANCE - IMPORTANT
Proof of health insurance is no longer required. If you receive 1095 A, B or C please submit it with your documents.

CHILD CARE INFORMATION			
Name	Complete Address	SS#/FEIN#	Amount Paid

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EDUCATION CREDITS FOR COLLEGE TUITION (Need Form 1098-T & Copy of Payment and Charges Statement)

Name & Address of Institution	Tuition Paid	Who Attended

FOREIGN ACCOUNTS:

At any time during 2022 did you own any Foreign Financial Assets with a Total Value of \$50,000 or greater? YES _____ NO _____
 At any time during 2022 did you (or your spouse) have a interest or signature or other authority over a financial account in a foreign country (such as a bank account, securities account, or other financial account) (does not include a mutual fund held by a US Brokerage Company) with combined values of greater than \$10,000? YES _____ NO _____

Other Information / Data Needed - Please Review and Respond Accordingly

Event	Documents or Information Required
1. Married, divorced, or separated in 2022	Married - prior year return of both spouses Divorced - copy of the divorce decree Separated - date of separation
2. Birth or adoption	Social Security Cards / Adoption Papers/Birth Certificate
3. Death of spouse or child	Date of death
4. Inheritance	Will; K-1 from the estate
5. Start or end a small business	Formation or termination dates; Property contributions or distributions
6. Lawsuit Settlements	Date received; reason for settlement; 1099-MISC
7. Prizes received	Form 1099-MISC; value of prizes not incl. on Form 1099-MISC
8. Refinance or Purchase home	Closing papers
9. Bankruptcy filing	Date Filed and Date Discharged
10. Debt forgiveness (i.e. Credit Cards) or Abandonment of property	Form 1099-C for cancellation Form 1099-A for abandonment
11. Lottery or gambling winnings	Total amount won whether on W-2G or not
12. Lottery or gambling losses	Total amount of losses
13. Any other income received	Amount received, from whom, and for what
14. ROTH IRA Conversions	Form 1099-R

Tax Return Preparation for 2022

We will prepare your tax return based on information you provide. In the event your return is audited, you will be responsible for verifying the items reported. It is important that you review the return carefully before signing to make sure the information is correct. Unless otherwise stated, the services for preparation of your return do not include auditing, review, or any other verification or assurance.

At any time during 2022, did you own any digital assets / virtual currency, i.e. BitCoin et.al.?

YES NO

