ORGANIZER

2022	1040	US	Miscellaneous Questions

If any of the following items pertain to you or your spouse for 2022,
please check the appropriate box and provide additional information if necessary.

PERSONAL INFORMATION

Please provide us with BOTH taxpayer and spouse's current e-mail address:

______________________________ ________________________________

Yes	No	
☐	☐	Do we have permission to send information to your e-mail address?
☐	☐	Did your marital status change during the year?
☐	☐	Did your address change during the year?
☐	☐	Can you be claimed as a dependent on another person's tax return for 2022?

DEPENDENTS

Yes	No	
☐	☐	Were there any changes in dependents?
☐	☐	Were any of your unmarried children who might be claimed as dependents 19 years of age or older at the end of 2022?
☐	☐	Did you have any children under age 19 (or children under age 24 who were full-time students) at the end of 2022, with interest and dividend income in excess of $1,150, or total investment income in excess of $2,300?
☐	☐	If you are divorced, did any child live with you in your home for more than 6 months of the year? If so, list names of children ________________________ If your child does not live in your home (other than a college student) for more than 6 months, please attach Form 8332.
☐	☐	Has your dependent college student child already filed his/her tax return? If so and you are claiming your college student as a dependent, please confirm your child checked the box "someone can claim you as a dependent" on their form 1040.

HEALTH CARE COVERAGE

Yes	No	
☐	☐	Did you receive IRS document Form 1095-A (Health Insurance Marketplace Statement)? If so, please attach. We do not need Forms 1095-B or 1095-C.

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INCOME

Yes	No	
☐	☐	Did you receive any disability income? If so, please provide all Form 1099-R's.
☐	☐	Did you have any foreign income or pay any foreign taxes (apart from US Brokerage accounts)?

PURCHASES, SALES AND DEBT

Yes	No	
☐	☐	During 2022, did you start a business or farm, purchase rental or royalty property, or acquire an interest in a partnership, S corporation, trust, or REMIC?
☐	☐	Did you purchase or dispose of any business assets (furniture, equipment, vehicles, real estate, etc.), or convert any personal assets to business use?
☐	☐	Did you buy or sell any stocks, bonds or other investment property in 2022?
☐	☐	Did you receive, exercise or sell any employee stock options? If so, please provide the last pay stub of the year and any documents pertaining to the transaction received from your employer, along with brokerage statements showing options vested, exercised and/or sold if applicable. Please provide Form 3922 if received.
☐	☐	Did you purchase, sell, or refinance your principal home or second home, or did you take out a home equity loan? If so, please provide closing settlement sheets.
☐	☐	Did you make any residential energy-efficient improvements or purchases involving solar, wind, geothermal or fuel cell energy sources? If so, please provide documentation.
☐	☐	Did you have any debt canceled or forgiven? If so, please provide Forms 1099-C or 1099-A, if received.
☐	☐	Have you loaned money to an individual under a bona fide loan that has been deemed worthless despite reasonable and documented collection efforts?

RETIREMENT PLANS

Yes	No	
☐	☐	Did you receive a 2022 distribution from a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.)? If so, please provide all Form 1099-R's received.
☐	☐	Did you make a 2022 contribution to a retirement plan (401(k), Roth IRA, Traditional IRA, SEP, SIMPLE, Qualified Plan, etc.)? Please provide amount and dates funded.

☐ ☐ Did you transfer or rollover any amount from one retirement plan to another retirement plan? If so, please provide any Form 1099-R's received.

☐ ☐ Did you convert part or all of your Traditional IRA, SEP, or SIMPLE IRA to a Roth IRA in 2022? Were any rollover amounts from a "nondeductible" IRA?

☐ ☐ Do you want to contribute to an IRA or Roth IRA before April 18th?

EDUCATION

Yes No

☐ ☐ Did you receive a distribution from an Education Savings Account or a Qualified Tuition Program? If so, please provide all Forms 1099-Q received.

☐ ☐ Did you, your spouse, or a dependent incur any tuition expenses required to attend a college, university, or vocational school? If so, please provide all Forms 1098-T received.

☐ ☐ Did you receive any tuition reimbursements from your employer?

☐ ☐ Did the student complete the first 4 years of post-secondary education before 2022?

☐ ☐ Did you contribute to a Section 529 education savings plan in 2022? If so, please provide the plan statement showing the beneficiary and the dates and amounts contributed.

ITEMIZED DEDUCTIONS

Yes No

☐ ☐ Do you have long-term care insurance? If so, please provide statements showing the premiums paid.

☐ ☐ Did you contribute cash to any qualified charities? Please provide documentation for all cash contributions.

☐ ☐ Did you donate non-cash items (to qualified charities) with a fair market value in excess of $500? If so, please provide the original cost of the item(s), date(s) of the donation, estimated fair market value of donation(s), and the name and address of the qualified charities receiving your donations. If less than $500, enter amount $______________

☐ ☐ Do you own more than one home that is NOT a rental property?

☐ ☐ Do your mortgage balances for non rental properties exceed $750,000?

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ESTIMATED TAXES

Yes	No	
☐	☐	Did you make quarterly estimated tax payments? If so, please provide copies of all payments made, including dates paid, to federal and state taxing authorities.
☐	☐	Did you apply an overpayment of 2021 taxes to your 2022 estimated tax (instead of receiving a refund)?
☐	☐	If you have an overpayment of 2022 taxes, do you want the excess applied to your 2023 estimated tax (instead of being refunded)?
☐	☐	Did you receive any federal or state tax notices changing the amount of your 2021 tax refund you applied to 2022? If so please provide copies.
☐	☐	If you are in a refund status, would you like the refund direct deposited? If so, provide the following information: Bank Routing Number ____________________________ Account Number ________________________________ Checking or Savings (please circle)
☐	☐	Do you expect your 2023 taxable income/withholdings to be different from 2022?

MISCELLANEOUS

Yes	No	
☐	☐	Do you want to allocate $3 to the Presidential Election Campaign Fund?
☐	☐	Does your spouse want to allocate $3 to the Presidential Election Campaign Fund?
☐	☐	May the IRS discuss your tax return with your preparer?
☐	☐	Did you earn income in states other than your home state? If so, which states?
☐	☐	Did you have an interest in or signature or other authority over a financial account in a foreign country, such as a bank account, securities account, life insurance, or other financial account? If so, did the combined accounts total $10,000 or more on any day during 2022?
☐	☐	Did you receive a distribution from, or were you the grantor of, or transferor to, a trust?
☐	☐	Was your home rented out or used for business?
☐	☐	Did you purchase items on-line or from out of state for which you did not pay sales tax? If so, please provide the total amount you paid in 2022, as you may owe use tax to your state of residence this year. $ ___________

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☐ ☐ Were you a policyholder who received payments under a long-term care (LTC) insurance contract or received any accelerated death benefits from a life insurance policy? If so, please provide documentation.

☐ ☐ Do you have an HSA? If so, is it an individual _____ or family _____ plan. Please provide copies of all forms 1099-SA and 5498 you have received.

☐ ☐ Did you engage the services of any household employees (not including cleaning person, yard maintenance, etc)?

☐ ☐ Did you or your spouse make any gifts to an individual or trust totaling more than $16,000?

☐ ☐ If you have a business, did you issue all required Forms 1099-NEC and 1099-MISC?

☐ ☐ **Did you receive, sell, exchange, gift, or otherwise dispose of a digital asset, such as cryptocurrency, bitcoin, etc.?**

Yes No

☐ ☐ Has either you or your spouse's drivers license expired since your last tax return filing? If yes, please provide the new issue and expiration dates.

Name __________________________ Issue date ____________ Expiration date____________

Name __________________________ Issue date ____________ Expiration date___________

Under current law, we need your permission in writing to speak to you about financial instruments designed to reduce your current tax (such as IRAs, SEP IRA's, etc). We do not sell any financial instruments, but we would like to be able to discuss with you these types of items in a tax planning capacity.

Yes No

☐ ☐ We (I), give Zaffore Ruane CPAs PC our (my) permission to speak to us (me) regarding financial instruments designed to help reduce tax due for the 2022 tax year.

Signature ____ Date ________________

Signature ____ Date_________________

We (I) hereby acknowledge answering the foregoing questions truthfully and to the best of our (my) knowledge.

Signature ____ Date ________________

Signature ____ Date_________________

We must have a signed copy of this form before we can start preparation of your tax return.