

Name: \_\_\_\_\_

Phone: \_\_\_\_\_

Best time to Call: \_\_\_\_\_

Email: \_\_\_\_\_

1) Did you move? YES NO If yes, what date: \_\_\_\_\_

New Address: \_\_\_\_\_

2) Did you buy/sell/refinance your home? YES NO

We need the settlement sheets.

3) Did you get an updated driver's license in 2022?

YES NO If yes, provide a copy updated driver's license.

4) At any time during 2022, did you have a financial interest in or signature authority over a financial account (bank, brokerage, etc.) located in a foreign country?

YES NO

5) At any time during 2022, did you: (a) receive (as a reward, award, or compensation); or (b) sell, exchange, gift or otherwise dispose of a digital asset (or a financial interest in a digital asset)?

YES NO

Including: mining, lending, an airdrop, staking, an initial coin offering – these will need to be reported.

6) In 2022, did you receive \$600 or more in money via an app for sales of goods or services? Form 1099-K YES NO

VENMO, EBAY, Pay Pal, Cash App, Stripe, Etsy, etc...

If YES, please provide the cost (COGS) for the item(s) sold.

7) Did you make a charitable contribution via Cash, Credit Card, or Check? YES NO \$ \_\_\_\_\_

(bank documented or letter from charity)

In 2022, \$300 Single / \$600 married max contribution if filing the standard deduction has expired.

8) Do you want direct deposit to the same bank account that we have on file? YES NO If new bank, provide:

Bank Name: \_\_\_\_\_  Checking  Savings

Routing # \_\_\_\_\_ Account # \_\_\_\_\_

9) In 2022, Purchase an Electric Vehicle? YES NO

We need: Year, Make, Model, VIN, Date Placed in Service.

In 2023, new restrictions: AGI limits, limited eligible autos, it's a non-refundable credit, U.S.A. assembly rules.

10) Teacher Expenses? YES NO \$ \_\_\_\_\_ In 2022, max \$300 for expenses for K thru 12 must work 900 hrs yr

11) Did you pay College Tuition? Form 1098-T YES NO

Provide statements for tuition, housing, & books paid.

Did the student Receive a Scholarship? YES NO

Student Name: \_\_\_\_\_ Full-Time or Part-Time

12) In 2022, install any residential energy items? YES NO

Include Install Cost: HVAC, Hot Water Boiler, Water Heater, Geothermal, Solar, Wind, Fuel Cells, Biomass Stove

No install Cost: Insulation, Doors, Windows, Roof

If yes, provide documentation & amount. **Energystar.gov**

In 2023, changed - up to \$1,200/yr for your residences

\* Windows & Skylights 30% up to \$600 Annually

\* Exterior Doors 30% up to \$250 for 1 Door,

\$500 for >1 Door Annually

\* Heat Pumps, Heat Pump Water Heaters, Central

Air, Woodstoves, some Furnaces qualify for 30%

up to \$2,000 (waives \$1,200 limit)

\* Energy Audits 30% up to \$150

13) Did you pay or have union dues withheld from your wages? YES NO \$ \_\_\_\_\_ (bring your last paystub)

14) Are you a retired Correction or Public Safety Officer?

YES NO From a State of Maryland Employer? YES NO

15) Do you have health care coverage? YES NO

Does your spouse have health care coverage? YES NO

Health Insurance from Marketplace 1095-A? YES NO

Do you authorize sharing your tax information with the Maryland Health Exchange to determine options for health care coverage? Need your email address YES NO

Did you Pay or Receive the following in 2022:

16) Wages or Election Judge Income Form W2 YES NO

17) Receive Social Security Form 1099-SSA YES NO

18) Retirement or IRA withdraw Form 1099-R YES NO

19) Receive Interest 1099-INT, Dividends 1099-DIV

Or Sell Stocks 1099-B YES NO

20) Unemployment Form 1099-G YES NO

21) Alimony paid or received YES NO

22) Receive an inheritance (you might get a K1) YES NO

23) Cancellation of Debt Form 1099-C YES NO

24) Gambling Winnings Form W-2G YES NO

25) Mortgage Interest Form 1098 YES NO

26) Property Taxes Paid YES NO

27) Significant Medical Expenses Paid YES NO

28) Health Savings Account Form 1099-HSA YES NO

29) Paid on Student Loans Form 1098-E YES NO

30) Contribute to a 529 Plan - Need Statements YES NO

31) Contribute to an IRA or ROTH - Statements YES NO

32) Pay Daycare Expenses - Need statements YES NO

33) Any Side Hustle / Hobby Income YES NO

34) Pay 2022 Estimated Taxes YES NO

For each payment provide: Paid To, Date Paid, Amount

35) 2022 Business Miles 36) 2022 Medical Miles

1/1 – 6/30 58.5 ¢ \_\_\_\_\_ 1/1 – 6/30 18 ¢ \_\_\_\_\_

7/1 – 12/31 62.5 ¢ \_\_\_\_\_ 7/1 – 12/31 22 ¢ \_\_\_\_\_