

2022 CHECKLIST FOR ACCURATAX LLC

Tax Payer _____ DOB _____ Social Security No. _____

Spouse _____ DOB _____ Social Security No. _____

Address _____ City _____ Zip _____

Phone _____ Email _____ Spouse Email _____

(If we have bank info from last year - just need last 4 of acct _____
Banking (Direct Deposit) Bank Name _____ Account _____

- 1) Do you want a Ecopy of your final tax return or do you want a hard copy with folder? Ecopy _____ Hard Copy _____
- 2) During 2022, did you receive a reward, award, payment or sell, exchange, gift or dispose of a digital asset? ___ No ___ Yes
- 3) Do you have any foreign accounts No ___ Yes ___
If yes, need to know total in all foreign accounts _____

*****NEW CLIENTS ONLY - PLEASE PROVIDE COPY OF 2021 TAX RETURN*****

THIS SECTION FOR CLIENTS WITH DEPENDENT CHILDREN

Only need info for NEW client dependents, current clients child born in 2022.

Name _____ Social _____ DOB _____

Name _____ Social _____ DOB _____

Add others in Additional notes section.

- A) Did dependents live with you all year ___ No of months ___
- B) Could anyone else claim the dependent _____
- C) Please provide one of the follow to prove is your dependent?
___ Healthcare Provider ___ School Record ___ Childcare Statement
___ Medical Records ___ Other
- D) Was dependent in school? (High School or College) ___ No ___ Yes
If NO and dependent worked need their 2022 income _____
- F) Have you ever been rejected any IRS child credits? ___ No ___ Yes

Additional Notes or Client Questions:

***Please just check items that apply to your tax return
and supply documentation supporting each item.***

Income and Deductions

☐ W2 Forms (Wages)
☐ 1099_MISC (Contract Work)
☐ 1099-INT or December Bank Statement (Banking Interest)
☐ Last year's State Refund Card
☐ Unemployment (Form 1099-G)
☐ Retirement Benefits (1099-R)
☐ Social Security Benefits
☐ Alimony received
☐ Daycare expenses
☐ College Education loan interest
☐ College Education expenses for dependents
 (1098T/Books/Materials)
☐ Educators Credit (Limit of \$250 school supplies)

IF YOU ITEMIZE (MFJ \$25,900, Single \$12,950, Household \$19,500

☐ 1098 (House Interest)
☐ Property taxes (2021 taxes paid in 2022)
☐ New Vehicle Purchase in 2022 (Please supply sale receipt)
☐ Cash contributions paid to Non-Profits
☐ Gift contributions given to Non-Profits
☐ Medical Expenses Out of Pocket NOTE: CANNOT BE FUNDS HSA PAID
☐ Medical Premiums (Generally W2 Employee can't deduct)
☐ Long Term Care Payments

STOCK, MUTUAL FUNDS, or IRA's

☐ 1099-B if you sold mutual funds or stock (Need Sell & Buy
amounts)
☐ 1099-DIV if you receive dividends from Mutual Funds or Stock
☐ IRA Contributions for 2022 (Don't need Roth Information)
☐ HSA Contributions and Distributions for 2022

ADDITIONAL QUESTIONS

	Yes	No
Did you receive any correspondence from the IRS	<input type="checkbox"/>	<input type="checkbox"/>
If yes please supply a copy of the letter.		
Did you sell or buy a home during 2022?	<input type="checkbox"/>	<input type="checkbox"/>
If yes, provide sale info and purchase info of home.		
(Page with all details - price, realtor fees, etc.)		

NOTES:

AccuraTax LLC Tax and Bookkeeping

Phone (970) 310-5232 Fax (970) 479-1673

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**This form is only a checklist for most businesses.
Provide other documentation. Example: P&L Statement.**

Name of Business _____
EIN or Social Security Number _____
Describe Business _____
How many years have you owned business _____

Date started business

Income for the year

Advertising

Contract Labor

Payroll & Payroll Taxes

Office expenses

Rent or Leases paid

Taxes & Licenses

Travel expenses

Meals WITH CLIENTS/EMPLOYEES (100% if in restaurants for 2022)

Meals at Meetings WITH EMPLOYEES (100%)

Gifts to Clients (Limit is \$25 per client)

Interest or Penalties on loans or credit cards for business.

Legal & Professional expenses

Cell phone or Business phone (Percentage for Business)

Internet (reasonable % used for Business)

Repairs and Maintenance

Tools and/or Material expenses

Insurance expense (Business Insurance Only)

Medical Insurance (Medical Premiums are deductible if self
employed and you nor your spouse has ACCESS to employee
insurance through a W2 job)

Other Expenses

VEHICLE EXPENSES - Any vehicle expenses need miles log.

Vehicle Year and Model

Purchase Price

Date vehicle put in business

Odometer reading beginning of year and end of year

(Miles Method) Business miles driven / Personal miles driven

(Actual Expenses Method)-(Gas, Insurance, License, Maintenance)

Need miles driven for the business if personal vehicle.

HOME OFFICE EXPENSE

Full House square footage

Home Office square footage

House Market Value at time business started

Land value at time business started

Cost of any major improvements to property this year

Mortgage Interest or Rent

Property Taxes

Property Insurance

Utilities (Gas, Electric, Trash)

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