Client Name:									
							Miller Block Building	Do you have' Roth IRA	
2023 l	Universal	Tax Rece	ord (	Checkl	ist		165 5th St SE	529 Plan Edu	ca
							Pine City, MN 55063	401K or other	retire
							Tel (320) 629-4745	HSA	
Please bring the followi	ing items to your a	ppointment:					Fax (516) 941-0225	U.S. Savings	Bonds
-							email todd@toddstaxservice.com		
_Please bring in a cop	oy of your 2022 tax	return and a pho	oto ID if	you are a ne	ew client.		Cell (612) 242-5713 texts ok.		
W-2 Forms. Bring fi	inal paystub too - i	t contains info no	t always	on your W-2	2.				
1099 Forms. (Thes	se could be 1099-F	R, 1099-MISC, 10	99-S, 10	99-Int)					
Certificate of Rent F	Paid if you rent you	ur home.					INCOME CHECKLIST	7	
Property Tax Stater	ment (most recent)	) if you own your	home.					IRS Form	
Do you or your spo	use have an IPIN?	(IRS issued ID T	heft Pin	#)			Wages	W-2	
				YES	NO		Unemployment	1099-G	
Has your marital status	changed since 12	2/31/2022?					Interest	1099-INT	
Are there <b>new depend</b>	lents in your house	ehold since 12/31	/22?*				Gambling	W-2G	
Have you received any	correspondence r	e your 2022 taxe	s?				Self Employment	1099-MISC	
Do you need advice on			?				IRA/ 401K Distribution	1099-R	
Do you have a bank (ch		account)?					Pension	1099-R	
Did you sell a home in :							Social Security	1099-SA	
Are you still waiting for							Investment Act	1099	
Have you filed for bank	• •	t cancelled in 202	3?			_	Crypto Account	1099	
Do you have health ins							"Gig" Economy	1099	
Did you receive any no							Sale of Real Estate	1099	
MFIPWork C							K-1 Estate, Trust, S Co	orp, Partr	
* Bring a social security		•					Rental Income		
New clients should brin	ig both (SS card al	na birth Cert) for a	all childre	en on the Ei	C form)		Other - please specify:	:	
Contact Info :	DOR	c	CON				Foreign Accounts?  Open IRS Issues?		
Taxpayer:	DOB DOB		SSN SSN		_		<u> </u>	100000	
Spouse:	DOB		SOIN		_		HSA Distribution (Form 1095-A from Hea	· ·	
Address:							Forms 1095-A from Hea	<u>~</u>	
-duicss.				New Depe	endents:		1 011113 1033 -A,B 01 0	(Health)	
				Name	SSN	DOB			
Home Telephone:				INGINE	0011	ВОВ			
Cell Phone: (Text Y or	N)						<del></del>		
Email taxpayer:	,			-			<del></del>		
Email spouse:				-			<del></del>		
State Income Tax -Did	you live or work in	another state oth	ner than	your home s	tate? Y	N	<del>_</del>		
	ST#1		ST #2	T		7 —			
	ST#1		ST #2			7			
Delivery Preference:		Online		US Mail		Pickup at Front Desk	Pickup out front in car		

Daycare Info: Name of Potwider: Name of College Student: Name of Colleg	Date of initial client submission of info to Todd:				Deductions/ Credits Detail	I have received a co	opy of this check	list:				
DEDUCTION CREDIT CHECKLIST				_		Taxpayer Initials	_ Spous	e Initials	Date:			
Address of Provider: Amount Paid: Care for:    Medical Bills   Mortgage Interest   Property Taxes	Daycare Info:											
Address of Provider: Amount Paid: Care for:    Medical Bills   Mortgage Interest   Property Taxes	Name of Provider:				<b>DEDUCTION /CREDIT CHECKLIST</b>				Energy Credit:			
Medical Bills Amount Paid: Care for:   Medical Bills  Medical Bills  New or Used Electric Car    Retiree Tax Planning Questions:									Home (Solar, Insulatio	n, HiEff Furr	nace, Geoth	hermal)
Amount Paid:	Fed Tax ID of Provider: -				Medical Bills				New or Used Electric (	Car		
Froperty Taxes Contributions  Wark Related Expenses Tution Information: We need 1098-T AND cancelled checks! Name of College Student: Name of Coll	Amount Paid: Care for:/				Mortgage Interest							
Work Related Expenses   Tuition Information:   Work Related Expenses   Tuition   Casually/Ineft Loss (Fire, Flood)   Daycare expenses   Do you have in Rifa accounts?   Do you have more than \$100,000 in IRAs?   Do you have RR Accounts?   Do you have more than \$100,000 in IRAs?   Do you have RR Accounts?   Do you have RR Accounts?   Do you have more than \$100,000 in IRAs?   Do you have RR ROTH IRA?   Do you have RR ROTH IRA?   Do you have Incert man \$100,000 in IRAs?   Do you have Incert man \$					Property Taxes				Retiree Tax Planning (	Questions:		
We need 1098-T.AND cancelled checks! Name of College Out of Pocket Costs - list: Daycare expenses Student Loan Interest Auto Tax (Tabs) State: Books (Required) Grants / Scholarships?  Name of College Books (Required) Name of College Student: Name of College Books (Required) Name of College Out of Pocket Costs - list: Unition and Fees Books (Required) Carst / Scholarships?  Name of College Correct / Scholarships?  Name of College Student: Name of College Correct / Scholarships?  Name of College Student: Name of College Correct / Scholarships?  Car #1 Tabs (License Plates) Car #2 Tabs (License Plates) Total Fee Books (Required) Car #2 Tabs (License Plates) Car #3 Tabs (License Plates) The personal property tax is deductable and is the sensual over \$52. Boats, Snown Mobile, RY. Trir - NOT DED Description of Vehicle: Description of Vehicle: Description of Vehicle: Correct / Car #2 Do you have more than \$10,0000 in IRAs? Do you have bong Term (are insurance? Total Fee Car #1 Tabs (License Plates) Car #2 Tabs (License Plates) Car #2 Tabs (License Plates) Car #2 Tabs (License Plates) Car #3 Tabs (License Plates) Total Fee Car #3 Tabs (License Plates) Car #2 Tabs (License Plates) Car #2 Tabs (License Plates) The personal property tax is deductable and is the sensual over \$52. Boats, Snown Mobile, RY. Trir - NOT DED State Balance Due other years Loaned overed S500 without detail. Interest the sock taxes in not declucible. Did you by a new car, boat or RY? Real Estate Tax Paid  Home Chain/Miles  North Card Add Taxes and the sensual over \$52. Do you have more than \$10,000 in IRAs? Do you have hong Term leave Interest the sensor on Devent.  Do you have Incar Era Insurance? Total Fee Contributions: Cash Ist Contributions: Cash Ist Contributions: Contributions: Contributions: Contributions on Federal.  Name: Contributions on Federal.  Name: Contributions on Federal.  Name: Contributions on Federal.  Name				•	Contributions							Y or N
Name of College Student: Unifor and Fees Student Loan Interest Auto Tax (Tabs) State: Grants / Scholarships? Name of College Student: Name of Coll	Tuition Information:				Work Related Expenses	No long	er deductible		Do you have a will?	Updated:		
Name of College Out of Pocket Costs - list: Duyou have a ROTH IRA? Do you made gifts in excess of \$17,000 per per per a long of the sex so of \$17,000 per per you have made gifts in excess of \$17,000 per per you have made gifts in excess of \$17,000 per per you have made gifts in excess of \$17,000 per per you have made gifts in excess of \$17,000 per per you have made gifts in excess of \$17,000 per per you have gifts in excess of \$17,000 per per you have gifts	We need 1098-T AND cancelled checks!				Tuition	_			Do you have IRA acco	unts?		
Out of Pocket Costs - list: Tuttion and Fees Do you have Long Term Care Insurance? Do you have Long Term Care Insurance? Do you have Long Term Care Insurance? Do you was land; Have you filed a "Transfer on Death" Deed? Have you made gifts in excess of \$17,000 per per you filed. Have you filed. That you filed a "Transfer on Death" Deed? Have you filed a "Transfer on Death" Deed? Have you filed. That you filed a "Transfer on Death" Deed? Have you filed. Have you filed. That you filed a "Transfer on Death" Deed? Have you filed. Have you filed. That you filed a "Transfer on Death" Deed? Have you filed.	Name of College Student:				Casualty/Theft Loss (Fire, Flood)				Do you have more that	n \$100,000 i	in IRAs?	
Auto Tax (Tabs)   State:	Name of College	_			Daycare expenses				Do you have a ROTH	IRA?		1
Do you own lead?   Do you have more than \$10,000 in savings bonds?   Do you have more than \$10,000 in savings bonds?   Do you have more than \$10,000 in savings bonds?   Do you have more than \$10,000 in savings bonds?   Do you have more than \$10,000 in savings bonds?   Do you have more than \$10,000 in savings bonds?   Do you have more than \$10,000 in savings bonds?   Do you have more than \$10,000 in savings bonds?   Do you have more than \$10,000 in savings bonds?   Name:   Do you have more than \$10,000 in savings bonds?   Do you have more than \$10,000 in savings bonds?   Name:   Do you have	Out of Pocket Costs - list:				Student Loan Interest				Do you have Long Ter	m Care Insu	rance?	
Grants / Scholarships?  Minnesota K-12 School Wisconsin Rent/Prop Tax Paid	Tuition and Fees				Auto Tax (Tabs)							
Wisconsin Rent/Prop Tax Paid Wi Rent - Heat Paid?  Name of College Student:  Name of College Out of Pocket Costs - list: Tuttion and Fees Books (Required) Grants / Scholarships?  Car # 1 Tabs (License Plates) Car # 2 Tabs (License Plates) Description of Vehicle:  Description of Vehicle: Gross (Total) Mileage for YR Commuting Miles (not ded) Wisconsin Rent/Prop Tax Paid Wisconsin Rent/Prop Tax Paid Wilk Rent - Heat Paid?  K-12 Expenses Name: Grade: Supplies Musical Instrument Computer Purchase Tuttion/Tutoring Transportation Paid Transportation Paid Transportation Paid Transportation Paid Transportation Paid Transportation Paid Transportation for School items. You must have receipts for school items. You must have receipts for school items. You must have receipts for school items. Minnesota allows a subtraction for contributions on Federal. Home Medical Miles Medical Miles  Minnesota allows a subtraction for contributions on Federal. Head of Household 20,800 +65	Books (Required)				State:				Have you filed a "Tran	sfer on Deat	h" Deed?	•
Wisconsin Rent/Prop Tax Paid Wi Rent - Heat Paid?  Name of College Student:  Name of College Out of Pocket Costs - list: Tuttion and Fees Books (Required) Grants / Scholarships?  Car # 1 Tabs (License Plates) Car # 2 Tabs (License Plates) Description of Vehicle:  Description of Vehicle: Gross (Total) Mileage for YR Commuting Miles (not ded) Wisconsin Rent/Prop Tax Paid Wisconsin Rent/Prop Tax Paid Wilk Rent - Heat Paid?  K-12 Expenses Name: Grade: Supplies Musical Instrument Computer Purchase Tuttion/Tutoring Transportation Paid Transportation Paid Transportation Paid Transportation Paid Transportation Paid Transportation Paid Transportation for School items. You must have receipts for school items. You must have receipts for school items. You must have receipts for school items. Minnesota allows a subtraction for contributions on Federal. Home Medical Miles Medical Miles  Minnesota allows a subtraction for contributions on Federal. Head of Household 20,800 +65	Grants / Scholarships?				Minnesota K-12 School				Have vou made gifts in	excess of §	\$17.000 pe	r person?
Name of College Student:	<u>'</u>			l	Wisconsin Rent/Prop Tax Paid				•			•
Name of College Student: Long Term Care Ins Premiums Paid  Name of College Out of Pocket Costs - list: Tuition and Fees Books (Required) Grants / Scholarships?  Name of College Car # 1 Tabs (License Plates) Car # 2 Tabs (License Plates) Car # 3 Tabs (License Plates) Car # 3 Tabs (License Plates) The personal property tax is deductible and is the amount over \$52.  Boat, Show Mobile, RV, Trir - NOT DED  Nilleage: State Balance Due Paid for 2022 State Balance Due other years Interest on back taxes is not deductible. Did you buy a new car, boat or RV? Commuting Miles (not ded) Work related miles not DEDUCTIBLE Charity Miles Medical Miles  Long Term Care Ins Premiums Paid  K-12 Expenses Name: Name: Name: Cart					·				, , , , , , , , , , , , , , , , , , , ,	, .,	J	
Out of Pocket Costs - list: Tuition and Fees Books (Required) Grants / Scholarships?  Car # 1 Tabs (License Plates) Car # 2 Tabs (License Plates) Car # 3 Tabs (License Plates) Car # 3 Tabs (License Plates) The personal property tax is deductible and is the amount over \$52.  Boat, Snow Mobile, RV, Trir - NOT DED State Balance Due Other years Gross (Total) Mileage for YR  Commuting Miles (not ded) Work related miles not DEDUCTIBLE Charity Miles Charity Miles Minesota allows a subtraction for Captinos over \$500 even if you don't itemize your deductions on Federal.  For an expectation of Captinos over \$500 even if you don't itemize your deductions on Federal.  For an expectation of Captinos over \$500 even if you don't itemize your deductions on Federal.  For an expectation of Captinos over \$500 even if you don't itemize your deductions on Federal.	Name of College Student:	_				_			K-12 Expenses			
Total Fee Books (Required) Grants / Scholarships?  Car # 1 Tabs (License Plates) Car # 2 Tabs (License Plates) Car # 3 Tabs (License Plates) Car # 1 Car # 2 C	Name of College						<u>-</u>		Name:			
Books (Required) Grants / Scholarships?  Car # 1 Tabs (License Plates) Car # 2 Tabs (License Plates) Car # 3 Tabs (License Plates) The personal property tax is deductible and is the amount over \$52.  Boat, Snow Mobile, RV, Trir - NOT DED Description of Vehicle:  Gross (Total) Mileage for YR  Commuting Miles (not ded) Work related miles not DEDUCTIBLE Charity Miles Musical Instrument Cash - list Musical Instrument Computer Purchase Tuition/Tutoring Transportation Paid  Do not include: internet fees, school lunches, clothing optional items. You must have receipts for school items.  You must have receipts for school items.  Minesota allows a subtraction for contributions:  Music Lessons Musical Instrument Computer Purchase Tuition/Tutoring Transportation Paid  Do not include: internet fees, school lunches, clothing optional items. You must have receipts for school items.  You must have receipts for school items.  Minesota allows a subtraction for contributions over \$500 even if you don't itemize your deductions on Federal.  Head of Household 20,800 +65	Out of Pocket Costs - list:								Grade:			
Grants / Scholarships?  Car # 2 Tabs (License Plates)  Car # 3 Tabs (License Plates)  The personal property tax is deductible and is the amount over \$52.  Mileage: Description of Vehicle:  Description of Vehicle:  State Balance Due Paid for 2022  State Balance Due other years  Interest on back taxes is not deductible. Did you buy a new car, boat or RV?  Real Estate Tax Paid  Work related miles not DEDUCTIBLE  Charity Miles  Musical Instrument  Computer Purchase  Tuition/Tutoring  Transportation Paid  Do not include: internet fees, school lunches, clothing optional items. You must have receipts for school items.  You must have receipts for school items.  Musical Instrument  Computer Purchase  Tuition/Tutoring  Transportation Paid  Do not include: internet fees, school lunches, clothing optional items. You must have receipts for school items.  Winnesota allows a subtraction for contributions over \$500 even if you don't itemize your deductions on Federal.  Head of Household 20,800 +65	Tuition and Fees				Total Fe	е			Supplies			
Car #3 Tabs (License Plates)  The personal property tax is deductible and is the amount over \$52.  Mileage: Description of Vehicle:  State Balance Due Paid for 2022 State Balance Due Other years  Interest on back taxes is not deductible.  Did you buy a new car, boat or RV?  Real Estate Tax Paid  Work related miles not DEDUCTIBLE Charity Miles Medical Miles  Car #3 Tabs (License Plates)  The personal property tax is deductible and is the amount over \$52.  Boat, Snow Mobile, RV, Trir - NOT DED  State Balance Due Paid for 2022 State Balance Due other years Interest on back taxes is not deductible. Did you buy a new car, boat or RV? Real Estate Tax Paid  Home Minnesota allows a subtraction for contributions over \$500 even if you Single 13,850 +65  Medical Miles  Medical Miles  Camputer Purchase Tuition/Tutoring Transportation Paid  Do not include: Internet fees, school lunches, clothing Optional items. You must have receipts for school items.  You must have receipts for school items.  Single 13,850 +65  don't itemize your deductions on Federal.  Head of Household 20,800 +65	Books (Required)				Car # 1 Tabs (License Plates)	Contribu	utions:		Music Lessons			
The personal property tax is deductible and is the amount over \$52.  Mileage: Description of Vehicle:	Grants / Scholarships?				Car # 2 Tabs (License Plates)	Cash - I	list		Musical Instrument			
and is the amount over \$52.  Mileage: Description of Vehicle: Description of V		<u></u>		•	Car #3 Tabs (License Plates)				Computer Purchase			
Mileage: Description of Vehicle: Description of Vehicl					The personal property tax is deductible	_			Tuition/Tutoring			
Description of Vehicle:    State Balance Due Paid for 2022   State Balance Due other years					and is the amount over \$52.				Transportation Paid			
State Balance Due other years  Interest on back taxes is not deductible. Did you buy a new car, boat or RV? Real Estate Tax Paid  Work related miles not DEDUCTIBLE Charity Miles Medical Miles  State Balance Due other years Interest on back taxes is not deductible. Did you buy a new car, boat or RV? Real Estate Tax Paid  Home Cabin/Second Home Cabin/Second Home Land  State Balance Due other years Internet fees, school lunches, clothing optional items. You must have receipts for school items.	Mileage:	Car #1	Car #2		Boat, Snow Mobile, RV, Trlr - NOT DED							
State Balance Due other years  Interest on back taxes is not deductible. Did you buy a new car, boat or RV? Real Estate Tax Paid  Work related miles not DEDUCTIBLE Charity Miles Medical Miles  State Balance Due other years Interest on back taxes is not deductible. Did you buy a new car, boat or RV? Real Estate Tax Paid  Home Cabin/Second Home Cabin/Second Home Land  State Balance Due other years Internet fees, school lunches, clothing optional items. You must have receipts for school items.	Description of Vehicle:				State Balance Due Paid for 2022	Clothing	g - goods li		Do not include:			
Gross (Total) Mileage for YR  Interest on back taxes is not deductible. Did you buy a new car, boat or RV?  Real Estate Tax Paid  Work related miles not DEDUCTIBLE Charity Miles Medical Miles  Interest on back taxes is not deductible. Did you buy a new car, boat or RV?  Real Estate Tax Paid  Minnesota allows a subtraction for contributions over \$500 even if you Single 13,850 +65 don't itemize your deductions on Federal.  Medical Miles	<u>'</u>				State Balance Due other years	_		etail.	internet fees, school lu	inches, cloth	ning	
Did you buy a new car, boat or RV?  Commuting Miles (not ded)  Work related miles not DEDUCTIBLE  Charity Miles  Medical Miles  Did you buy a new car, boat or RV?  Real Estate Tax Paid  Minnesota allows a subtraction for contributions over \$500 even if you Single 13,850 +65  don't itemize your deductions on Federal. Head of Household 20,800 +65	Gross (Total) Mileage for YR				Interest on back taxes is not deductible.	_			optional items.		•	
Commuting Miles (not ded)  Work related miles not DEDUCTIBLE  Charity Miles  Minnesota allows a subtraction for 2023 Standard Deduction  Contributions over \$500 even if you Single 13,850 +65  Land  Minnesota allows a subtraction for contributions over \$500 even if you Single 13,850 +65  don't itemize your deductions on Federal. Head of Household 20,800 +65					Did you buy a new car, boat or RV?				You must have receipt	s for school	items.	
Work related miles not DEDUCTIBLE  Home Charity Miles Cabin/Second Home Medical Miles  Home Cabin/Second Home Cabin/Second Home Land  Minnesota allows a subtraction for contributions over \$500 even if you contributions over \$600 even if you contributions over \$600 even if you don't itemize your deductions on Federal.  Head of Household 20,800 +65	Commuting Miles (not ded)								·			
Medical Miles  Land  don't itemize your deductions on Federal.  Head of Household  20,800 +65	Work related miles not DEDUCTIBLE				Home	Minnesota	a allows a subtraction	for	2023 Standard Deduct	ion		
	Charity Miles				Cabin/Second Home	contribution	ons over \$500 even if	you	Single	13,850	+65	1850
	Medical Miles				Land	don't item	ize your deductions o	n Federal.	Head of Household	20,800	+65	1850
	You must have written records (log) to take a dec	duction.	!	•	Penalties and late payment interest not deductible.	_			Married Filing Joint	27,700	+65	1500
Mileage to and from home and work is not deductible. (Higher for 65+) +65	·								(Higher for 65+)		+65	
2022 2022 <b>2023</b> Office in home		2022	2022	2023	3	Office ir	n home		,			
Mileage Rates 01/01-05/31 6/30-12/31 Must use office area exclusiv Minnesota Non Game Wildlife Designation: YESNO_	Mileage Rates	01/01-05/31	6/30-12/31			Must us	se office area exc	<i>lusiv</i> Minnesot	ta Non Game Wildlife De	signation: `	YES	NO
Business Use 56c 58½c-62½ 65¢ for business. Ask for info. US Presidential Election Fund YES NO	Business Use	56¢	58½¢-62½	65¢								
Medical 16c 18-22¢ 22¢ Sales Tax on new car or truck: Minnesota Political Party: R D G I	Medical	16¢	18-22¢	22¢	Sales Tax on new car or truck:							
Charitable 14¢ 14¢ Use higher of income tax or sales tax.	Charitable	14¢	14¢	14¢	Use higher of income tax or sales tax.	_						
	Moving	16¢	18-22¢				Please	attach a void	ded check for direct depor	sit or direct o	lebit.	Todd's Tax