

JEAN A. CORDASCO, CPA

2022 GENERAL INCOME TAX INFORMATION

TAXPAYER: _____ SPOUSE: _____
NAME: _____ NAME: _____
SS#: _____ SS#: _____
OCCUPATION: _____ OCCUPATION: _____
DOB: _____ DOB: _____
PHONE: _____ PHONE: _____
ADDRESS: _____ COUNTY: _____
EMAIL: _____
DEPENDENTS: (NAMES, DOB, SS#) _____

TOTAL # OF W-2'S _____ TOTAL # OF 1099'S _____

PLEASE ANSWER THE FOLLOWING QUESTIONS (IF "YES" PLEASE PROVIDE DOCUMENTATION)

<i>DID YOU RECEIVE INCOME FROM:</i>	YES	NO
INTEREST OR DIVIDENDS (FORM 1099-INT/DIV)	___	___
YOUR OWN BUSINESS, PROFESSION, FARM? (SCH C OR CORPORATE PARTNERSHIP)	___	___
SALES OF STOCKS, BONDS?	___	___
INSTALLMENT SALES CONTRACTS?	___	___
PENSIONS, PROFIT-SHARING PLANS, ANNUITIES? (FORM 1099R)	___	___
RENTS OR ROYALTIES? (SCH E)	___	___
PARTNERSHIPS, ESTATES, TRUSTS? (FORM K-1)	___	___
S CORPORATIONS? (FORM K-1)	___	___
COMMISSIONS?	___	___
UNEMPLOYMENT COMPENSATION? (FORM 1098G)	___	___
SOCIAL SECURITY INCOME?	___	___
GAMBLING INCOME? (W2G)	___	___

JEAN A. CORDASCO, CPA

DID YOU HAVE ANY:	YES	NO
CONTRIBUTIONS TO AN IRA? TYPE _____ AMOUNT _____	_____	_____
CHILD OR DEPENDENT CARE EXPENSES?	_____	_____
DID YOU MAKE ANY 2022 ESTIMATED PAYMENTS?	_____	_____
(IF 'YES' , SHOW AMOUNTS & DATES)		
FEDERAL \$ _____	\$ _____	\$ _____
STATE \$ _____	\$ _____	\$ _____

IF YOU HAVE AN OVERPAYMENT OF 2022 TAXES , DO YOU WANT THE EXCESS:
REFUNDED? _____ APPLIED TO YOUR 2023 ESTIMATED TAXES? _____
DO YOU WANT YOUR REFUND TO BE DEPOSITED DIRECTLY INTO YOUR BANK ACCOUNT? _____
IS THE DIRECT DEPOSIT INFORMATION THE SAME AS LAST YEAR? _____

DID ANY OF YOUR DEPENDENT CHILDREN UNDER 24 YEARS OF AGE HAVE UNEARNED INCOME OVER \$2300.00	_____	_____
DID YOU PURCHASE, SELL, EXCHANGE YOUR PERSONAL RESIDENCE?	_____	_____
DID YOU HAVE ANY FOREIGN BANK OR TRUST ACCOUNTS?	_____	_____
HAS THE IRS AUDITED ANY OF YOUR TAX RETURNS DURING THE PAST YEAR?	_____	_____
DID YOU GIVE ANY GIFTS EXCEEDING \$16,000 IN 2022 TO ANY PERSON?	_____	_____
DID YOU RECEIVE, SELL, SEND, EXCHANGE OR OTHERWISE ACQUIRE ANY FINANCIAL INTEREST IN ANY VIRTUAL CURRENCY IN 2022?	_____	_____
DID YOU HAVE MEDICAL INSURANCE IN 2022?	_____	_____
DID YOU BUY MEDICAL INSURANCE THROUGH MARKETPLACE? IF YES, PROVIDE FORM 1095-B)	_____	_____
DID YOU <u>PURCHASE</u> SOLAR ENERGY SYSTEM IN 2022?	_____	_____
DID YOU MAKE ANY ENERGY SAVING IMPROVEMENTS TO YOUR PRIMARY HOME IN 2022? (DOORS, WINDOWS, INSULATION, HEATER/AC)	_____	_____

JEAN A. CORDASCO, CPA

DID YOU PURCHASE AN ELECTRIC CAR IN 2022? _____

DID ANYONE IN FAMILY ATTEND COLLEGE? _____

WAS ANY STUDENT LOAN INTEREST PAID? _____

2022 ITEMIZED DEDUCTIONS

MEDICAL:

PRESCRIPTION MEDICINE \$ _____

MEDICAL & DENTAL INSURANCE PREMIUMS \$ _____

DOCTORS, DENTISTS \$ _____

HOSPITALS \$ _____

OTHER – PLEASE LIST _____

_____ \$ _____

TRANSPORTATION FOR MEDICAL ATTENTION _____ MILES

TAXES:

REAL ESTATE TAXES \$ _____

INTEREST:

HOME MORTGAGE 1ST _____ 2ND _____

TO WHOM PAID (FORM 1098) 1ST _____ 2ND _____

DID YOU TAKE OUT A HOME MORTGAGE OR ANY OTHER HOME DEBT IN 2022? _____

DID YOU REFINANCE IN 2022? _____

CONTRIBUTIONS: (FOR WHICH YOU HAVE RECEIPTS OR CANCELLED CHECKS)

CHURCHES (SPECIFY CHURCH NAME) _____ \$ _____

OTHER: (PLEASE LIST) _____
_____ \$ _____

JEAN A. CORDASCO, CPA

NON-CASH CONTRIBUTIONS: (PLEASE LIST ORGANIZATION, PROPERTY DONATED AND FAIR MARKET VALUE)

_____ \$ _____

ITEMS FOR DISCUSSION: _____
