ORGANIZER Page 1

2022 | 1040 | US | Tax Organizer

## NESS TAX & BOOKKEEPING SERVICE 1616 E 10TH ST SIOUX FALLS SD 57103

Telephone number: (605) 332-4829 Fax number: (605) 357-7144

E-mail address: contact@nesstax.com

Tax Return Appointment

Date: Time: Location:

This tax organizer will assist you in gathering information necessary for the preparation of your 2022 tax return. Please enter all pertinent 2022 information.

NOTE: If you claim the earned income credit, please provide proof that your child is a resident of the United States. This proof is typically in the form of: school records or statement, landlord or property management statement, health care provider statement, medical records, child care provider records, placement agency statement, social service records or statement, place of worship, Indian tribal office statement, or employer statement.

NOTE: If your child is disabled, please provide one of the following forms of proof of disability: doctor statement, other health care provider statement, or social services agency or program statement.

CLIENT INFORMA	TION	Taxpayer	Spouse
First name and initial			·
Last name			
Title/suffix			
Social security number			
Occupation			
Date of birth (m/d/y)			
Date of death (m/d/y)			
1=blind			
Home phone			
Work phone			
Work extension			
Cell phone			
E-mail address			
	In care of		
	Street address		
A data a a a	Apartment number		
Address	City		
	State		
	ZIP code		
DEDENDENTS			
DEPENDENTS		Dependent No.	Dependent No.
First name			
Last name			
Title/suffix			
Date of birth (m/d/y)			
Date of death (m/d/y)			
Date of adoption (m/d/y)			
Social security number			
Relationship			
Months lived at home			
		Dependent No.	Dependent No.
First name			
Last name			
Title/suffix			
Date of birth (m/d/y)			
Date of death (m/d/y)			
Date of adoption (m/d/y)			
Social security number			
Relationship			
Months lived at home			

2	1040	US	Tax	Organi	zer			
ı				_				
	a 0	Pleas	se enter	all perting	ent 2022 inf	formati	on. If you have attachend nd do not enter a 2022	ed Pamount
\A/A @	_			or arriter	II, CHECK III	е вох а	rid do riot eriter a 2022	z amount.
	SES, SALAF	RIES AND	HPS					
Emplo	yer name:					1	2022 Amount	2021 Amount
							Attach Forms W-2	
							Attach Forms W-2	
						\		
INTE	REST INCO	MF						
	name:	/\\L						
	ao.							
┥ -								
							Attach Forms 1099-IN	IT
┑‐								
┦ ‐								
DIVID	DEND INCO	ME						
Payer	name:							
							Attach Forms 1099-DI	IV
-							Attach Forms 1099-DI	IV
PENS	SIONS, IRA	AND GAN	ИBLING	INCOME			Attach Forms 1099-DI	IV
	SIONS, IRA	AND GAN	ИBLING	INCOME				
		AND GAN	ИBLING	INCOME			Attach Forms 1099-Di	
		AND GAN	ЛBLING	INCOME			Attach Forms	
Payer -	name:						Attach Forms	
Payer \	name: Winnings not r	eported on W	<i>J-</i> 2G			ľ	Attach Forms	
Payer \	name: Winnings not r	eported on W	<i>J-</i> 2G			ľ	Attach Forms	
Payer -	name: Winnings not r Total gambling	eported on W	J-2G			ľ	Attach Forms	
Payer	mame:  Winnings not r Total gambling	eported on W I losses	J-2G	INCOME			Attach Forms	
Payer	winnings not r Total gambling ER GOVER Form 1099-B -	eported on W losses NMENT FC Sales of sto	J-2G ORMS -	INCOME	action history) .		Attach Forms	
Payer	winnings not r Total gambling ER GOVER Form 1099-B -	eported on W losses NMENT FO Sales of sto SC - Miscella	J-2G  ORMS - ck (also ir neous inc	INCOME	action history) .		Attach Forms 1099-R & W-2G	Forms 1099
Payer	winnings not r Total gambling ER GOVER Form 1099-B - Form 1099-MIS Form 1099-K -	eported on W losses NMENT FO Sales of sto SC - Miscella Merchant ca	J-2G  ORMS - ck (also ir neous inc	INCOME	action history)		Attach Forms 1099-R & W-2G	
Payer	winnings not r Total gambling ER GOVER Form 1099-B - Form 1099-MIS Form 1099-K -	eported on W losses NMENT FO Sales of sto SC - Miscella Merchant ca	J-2G  ORMS - ck (also ir neous inc	INCOME	action history) .		Attach Forms 1099-R & W-2G	
Payer	winnings not r Total gambling ER GOVER Form 1099-B - Form 1099-K - Form 1099-S -	eported on W I losses NMENT FO Sales of sto SC - Miscella Merchant ca Sales of rea	J-2G  ORMS - ck (also ir neous inc ird and thi I estate (a	INCOME clude transactions and party network liso include to	action history)work payments closing stateme	  ents) .	Attach Forms 1099-R & W-2G Attach	
OTHI	winnings not r Total gambling ER GOVER Form 1099-B - Form 1099-K - Form 1099-S -	eported on W I losses NMENT FO Sales of sto SC - Miscella Merchant ca Sales of rea	J-2G  ORMS - ck (also ir neous inc ird and thi I estate (a	INCOME clude transactions and party network liso include to	action history)	  ents) .	Attach Forms 1099-R & W-2G	
OTHI	Winnings not r Total gambling ER GOVER Form 1099-B - Form 1099-K - Form 1099-S - Form 1099-G - syer:	eported on W I losses  NMENT FC Sales of sto SC - Miscella Merchant ca Sales of rea  State tax rei	J-2G  ORMS - ck (also ir neous inc ird and thi I estate (a	INCOME collection of party networks include to the collection of t	action history) work payments closing stateme	ents) .	Attach Forms 1099-R & W-2G Attach	
OTHI	Winnings not r Total gambling ER GOVER Form 1099-B - Form 1099-K - Form 1099-S - Form 1099-G - syer: Form SSA-109	eported on W I losses  NMENT FC Sales of sto SC - Miscella Merchant ca Sales of rea  State tax rei	J-2G  ORMS - ck (also ir neous inc ird and thi I estate (a	INCOME clude transactions of party networks include the first control of	action history) work payments closing stateme	ents) .	Attach Forms 1099-R & W-2G Attach Attach Forms 1099	
OTHI	Winnings not r Total gambling ER GOVER Form 1099-B - Form 1099-K - Form 1099-S - Form 1099-G - tyer: Form SSA-109 Form 1099-G -	eported on W I losses NMENT FO Sales of sto SC - Miscella Merchant ca Sales of rea State tax rei	J-2G  ORMS - ck (also ir neous inc ird and thi I estate (a	INCOME clude transaction and party network lso include the center of the	action history) work payments closing stateme	ents) .	Attach Forms 1099-R & W-2G Attach	
OTHI	winnings not r Total gambling ER GOVER Form 1099-B - Form 1099-K - Form 1099-G - ryer: Form SSA-109 Form 1099-G - Form 1099-G -	eported on Williams NMENT FO Sales of sto SC - Miscella Merchant ca Sales of rea State tax rei 19 - Social se Unemploym 529 Plan)	J-2G  ORMS - ck (also income and thing and thing and thing and thing and thing are compensated as a curity bear and compensat	INCOME clude transace ome rd party neto lso include of efits	action history)work payments closing stateme	ents) . (	Attach Forms 1099-R & W-2G Attach Attach Forms 1099	
OTHI	Winnings not r Total gambling ER GOVER Form 1099-B - Form 1099-K - Form 1099-G - EVER FORM 1099-G - EVER FORM 1099-G - EVER FORM 1099-G (5) FORM 1099-QA/	eported on Williams NMENT FO Sales of sto SC - Miscella Merchant ca Sales of rea State tax rei 19 - Social se Unemploym 529 Plan)	J-2G  ORMS - ck (also income and thing and thing and thing and thing and thing are compensated as a curity bear and compensat	INCOME clude transace ome rd party neto lso include of efits	action history) work payments closing stateme	ents) . (	Attach Forms 1099-R & W-2G Attach Attach Forms 1099	
OTHI  Taxpa  I  Spous	Winnings not r Total gambling ER GOVER Form 1099-B - Form 1099-K - Form 1099-G - EVER FORM 1099-G - EVER FORM 1099-G (SE) FORM 1099-QA/ EVER FORM	eported on Williams I losses  NMENT FOR Sales of storm Scales of real State tax real state tax real state tax real scales of real search Scales of real search Scales of real scales	J-2G  ORMS - ck (also in the control of the co	INCOME  Include transation  Include transation	action history)work payments closing stateme	ents)	Attach Forms 1099-R & W-2G Attach Attach Forms 1099	
OTHI  ITaxpa  ISpous	winnings not r Total gambling ER GOVER Form 1099-B - Form 1099-K - Form 1099-S - Form 1099-G - tyer: Form SSA-109 Form 1099-Q (E) Form 1099-QA/ se: Form SSA-109	eported on Williams I losses  NMENT FOR Sales of stomatics of season of real state tax rea	J-2G	INCOME  clude transa  me  rd party netw  lso include of	action history)	ents) .	Attach Forms 1099-R & W-2G  Attach  Attach Forms 1099  Attach Forms 1099	
OTHI  I  Taxpa:  Spous	Winnings not r Total gambling ER GOVER Form 1099-B - Form 1099-K - Form 1099-G - ryer: Form SSA-109 Form 1099-QA/ Se: Form SSA-109 Form SSA-109 Form 1099-QA/ Se: Form SSA-109	eported on W I losses  NMENT FC Sales of sto SC - Miscella Merchant ca Sales of rea  State tax rei 9 - Social se Unemploym 529 Plan) 5498-QA (AB	J-2G  ORMS - ck (also in the least and the least are composite to the least are lea	INCOME aclude transation and party network include transation and transation are station and transation are station are statio	action history)work payments closing stateme	ents) .	Attach Forms 1099-R & W-2G Attach Attach Forms 1099	

ORGANIZER 2022 1040 US Tax Organizer MISCELLANEOUS INCOME Taxpayer: Alimony received Spouse: Alimony received Other: RETIREMENT PLAN CONTRIBUTIONS 2022 Amount 2021 Amount Taxpayer: Traditional IRA contributions (1=maximum)..... Roth IRA contributions (1=maximum)..... Self-employed, SEP, SIMPLE, & qualified plan contributions (1=maximum) . . . . . Spouse: Roth IRA contributions (1=maximum)..... Self-employed, SEP, SIMPLE, & qualified plan contributions (1=maximum) . . . . . OTHER GOVERNMENT FORMS - DEDUCTIONS Attach Forms 1098 AFFORDABLE CARE ACT Form 1095-A - Health Insurance Marketplace Statement Attach Forms 1095 Form 1095- B - Health Coverage ..... Form 1095-C - Employer-Provided Health Insurance Offer and Coverage . . . . . ADJUSTMENTS TO INCOME Taxpayer: Educator expenses..... Other adjustments to income: Spouse: Educator expenses... Other adjustments to income: MEDICAL AND DENTAL EXPENSES Prescription medicines and drugs ...... Doctors, dentists and nurses..... Insurance premiums..... Insurance reimbursement..... Number of medical miles..... Other: TAXES PAID State income taxes - 1/22 payment on 2021 state estimate

ORGANIZER 2022 1040 US Tax Organizer TAXES PAID (continued) 2022 Amount 2021 Amount State income taxes - paid with 2021 state extension State income taxes - paid with 2021 state return State income taxes - paid for prior years and/or to other states City/local income taxes - 1/22 payment on 2021 city/local estimate City/local income taxes - paid with 2021 city/local extension City/local income taxes - paid with 2021 city/local return State and local sales taxes (except autos and special items) ..... Use taxes paid on 2022 purchases Use taxes paid on 2021 state return Sales tax on autos not included above... Sales taxes paid on boats, aircraft, and other special items ..... Foreign income taxes..... Attach Tax Notice Personal property taxes (including automobile fees in some states) . . . . INTEREST PAID Home mortgage interest and points paid: Attach Forms 1098 Home mortgage interest not on Form 1098 (include name, SSN, & address of payee): Points not reported on Form 1098: Investment interest (interest on margin accounts): Passive interest..... CASH CONTRIBUTIONS NOTE: No deduction is allowed for cash or check contributions unless the donor maintains a bank record, or a written communication from the donee, showing the name of the organization, contribution date(s), and contribution amount(s) Volunteer expenses (out-of-pocket)..... Number of charitable miles..... NONCASH CONTRIBUTIONS NOTE: No deduction is allowed for contributions of clothing and household items that are not in good used condition or better, in addition, a deduction for any item with minimal monetary value may be denied. MISCELLANEOUS DEDUCTIONS Tax return preparation fee..... Safe deposit box rental..... Investment expenses. Estate tax, section 691(c)..... Unreimbursed employee expenses: Other: