

**2022 INCOME TAX DATA ORGANIZER**

*Continued*

<b>VARIOUS EXPENSES &amp; CONTRIBUTIONS</b>	
	Amount
<b>Alimony</b> Paid to : _____ (unless divorce was finalized after 2018)	\$
<b>IRA (Traditional)</b> Contribution for 2022? Taxpayer ..... Spouse .....	
<b>IRA (Roth)</b> Contribution for 2022? Taxpayer ..... Spouse .....	
<b>IRA Conversions ?</b> Yes _____ No _____	
<b>SEP</b> Contributions for 2022? Taxpayer ..... Spouse .....	
<b>HSA</b> (Health Sav. Acct) Contributions? <i>(not contributed through employer)</i> Taxpayer ..... Spouse ..... Bring both 5498-SA and 1099-SA Forms	
<b>Student Loan Interest?</b> Reported on 1098Es Must be personally liable for the loan	

<b>* CHARITABLE CONTRIBUTIONS</b>	
	Amount
Money Donations by Check/Credit Card (Must <u>also</u> have receipts if over \$250) Please make your own list and bring supporting documentation	\$
Property (Clothing, etc) Donations Please bring receipts (Goodwill & S/A and such receipts must show list of items donated)	
# of Miles Driven for Charity	

<b>MISCELLANEOUS EXPENSES</b>	
	Amount
Teachers: Classroom Expenses, Taxpayer Teachers: Classroom Expenses, Spouse (Teacher expenses up to \$300 are deductible, including PPE and dues)	
* Gambling Losses (up to Winnings)	

<b>* MEDICAL EXPENSES</b> (If substantial, above 7.5% of income)	
Insurance Premiums - Only if Taxed	
Medicare Premiums	
Long Term Care Premiums	
Prescriptions	
Eyeglasses, Contacts	
Doctors, Dentists	
Hospital, Clinics	
Medical Supplies	
Other Medical Expenses	
Other Medical Expenses	
# of Miles driven for Medical Purposes	
Reimbursements received	

<b>* TAXES - bring documentation</b>	
	Amount
Real Estate Tax	
Second House Tax	
Vehicle Taxes _____ + _____ + _____	
Personal Property Taxes	
Sales Tax on Large Purchases, Autos	

<b>* INTEREST PAID - bring 1098 interest documentation</b>	
Home Mortgage Interest	
Second Home Mortgage Interest	
Home Equity, if for improvements	

<b>In 2022, did you:</b>	
Take Education Courses? (Please bring all 1098-Ts)	_____
Exercise Stock Options?	_____
Made Energy Improvements? (Bring receipts and how they qualify)	_____
Give gifts valued \$16,000 or over?	_____
Refinance? Bring settlement papers	_____
Had credit card/loan forgiveness? bring 1099-A and/or 1099-C	_____

<b>FOR YOUR OWN WELFARE</b>	
Do you have a Current Will?	
Have you designated every beneficiary?	

**\* NOTE: To benefit from Medical, Interest, Taxes, Charity & Gambling losses by itemizing (using Schedule A), their total\*\* will have to exceed your standard deduction.**  
 (\*\*total of Medical over 7.5%, Mortgage Interest, Charitable, Gambling loss & Property/State Taxes up to \$10,000)  
 Standard deduction for Singles is \$12,950, over 65 yrs old \$14,700  
 Standard deduction for Head of Household is \$19,400, over 65 yrs old \$21,150  
 Standard deduction for Married Filing Joint is \$25,900, over 65 yrs old \$28,700  
 Bring all such information just in case you have enough to itemize.