

# 2022 Tax Preparations

## Income:

Totals \*for the whole year

w-2's	_____
1099-int (interest)	_____
1099-div(dividends)	_____
1099-(G )tax refunds	_____
Alimony received	_____
1099-MISC(income)	_____
1099-NEC (income)	_____
1099-B(capital Gain/loss Brokerage account)	_____
Sale of any property/assets	_____
1099-R (IRA/401K/PENSION DISTRIBUTIONS)	_____
k-1 (Business income/loss)	_____
1099-G (unemployment)	_____
1099-SSR (Social Security)	_____
Other income	_____

## Income Adjustments:

Teacher expenses	_____
Health Savings Account	_____
SEP/SIMPLE Contributions	_____
SE Heath Insurance premiums	_____
Contributions to IRA's	_____
1098-Student loan interest	_____
Tuition and fees (college)	_____

# Deductions and Credits:

## Medical & Dental Expenses:

Insurance premiums: \_\_\_\_\_

Co-pays & doctor/professionals: \_\_\_\_\_

Lab & x-ray: \_\_\_\_\_

Prescriptions: \_\_\_\_\_

Therapy & long term care cost: \_\_\_\_\_

Eye care: \_\_\_\_\_

Dental expenses: \_\_\_\_\_

Mileage/travel expenses: \_\_\_\_\_

Other medical expenses: \_\_\_\_\_

**Taxes:** \_\_\_\_\_

Real estate taxes paid: \_\_\_\_\_

Local & State Taxes paid: \_\_\_\_\_

Sales Tax paid: \_\_\_\_\_

Foreign Taxes paid: \_\_\_\_\_

Estimated taxes paid: \_\_\_\_\_

**Home Expenses:**

Mortgage interest (1098-int): \_\_\_\_\_

Mortgage insurance premiums (PMI insurance): \_\_\_\_\_

Energy improvements: \_\_\_\_\_

Windows/Exterior doors: \_\_\_\_\_

Installation: \_\_\_\_\_

Other home improvements: \_\_\_\_\_

## Charity donations and Gifts:

Cash:

Who: \_\_\_\_\_ When: \_\_\_\_\_ How much: \_\_\_\_\_

Items:

What: \_\_\_\_\_ To Whom: \_\_\_\_\_ When: \_\_\_\_\_

Mileage:

Why: \_\_\_\_\_ When: \_\_\_\_\_ For Whom: \_\_\_\_\_ How many: \_\_\_\_\_

Other items:

What: \_\_\_\_\_ when: \_\_\_\_\_ to whom: \_\_\_\_\_ how much/cost: \_\_\_\_\_

## misc Expenses:

union dues \_\_\_\_\_

work expenses \_\_\_\_\_

## Child/dependent Care

Child care: who: \_\_\_\_\_ when: \_\_\_\_\_ how much paid: \_\_\_\_\_

Education expenses: (1098-T): \_\_\_\_\_

Where: \_\_\_\_\_ for whom: \_\_\_\_\_ how much: \_\_\_\_\_

## Retirement Savings contributions:

401(K)'s: \_\_\_\_\_

Traditional, SEP, SIMPLE, IRA's: \_\_\_\_\_

ROTH Contributions: \_\_\_\_\_

Business Expenses: Schedule C preparations:

Gross Receipts/Income (1099-misc/nec) :

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Advertising:

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Business Travel:

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Lodging:

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Transportation:

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Meals :

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Other:

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Commissions and Fees:

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Communication:

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Contract Labor:

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Insurance

Health:

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Business:

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Workman's Comp:

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Interest:

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Legal and Professional fees:

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Meals

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Office Expenses:

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Rental Expenses:

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Repairs & Maintenance:

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Supplies:

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Taxes & Licenses:

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Utilities:

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Postage:

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Printing:

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Dues & Subscriptions:

---

Memberships:

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Bank Fees:

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Mileage:

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tolls:

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Parking:

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Home office deduction:

Size of office:

---

Utilities total for house:

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Decor:

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Research & Development

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Credit Card Process fees:

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Uniforms:

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Business Gifts

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Conferences

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Equipment purchases

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