Accounting EA, Inc.
4255 Westbrook Drive #206
Aurora, IL 60504
630-755-6060

# 2022 PERSONAL INCOME TAX CLIENT ORGANIZER

The information requested on this form is for the preparation of your personal income tax return and relates to you and your family personally-***not your business operations***. While we realize that not all tax issues can be addressed in this organizer, please feel free to write any additional comments or questions that you may have in the space provided on page 4 of this document. Or, if you prefer, an expanded version is available by calling or e-mailing our office.

Please complete and return this form to us at **P.O. Box 2527, Naperville, IL 60567**, or fax to **630-755-6070**, or e-mail to **info@accountingea.com** as soon as possible--but **no later than March 15, 2023.** For your added security, we do have portals. Please call for a login and instruction on how to upload. The IRS prefers fax or portals for security reasons.

If you need help in preparing this form, or have any questions, please contact us at 630-755-6060. **Tax returns will NOT be prepared without signed disclosures.**

**Client Name:** ____________________________ SSN: ____________ DOB: _________

**Spouse:** ________________________________ SSN: ____________ DOB: _________

**Address:** ____________________________________________________________

**City, State, Zip:** _______________________________________________________

**Best Phone:** _________________________ **Alternate Phone:** ___________________

**E-mail:** ______________________________________________________________

**Filing Status:** ___Single ___Married ___Married filing separately __Head of Household

**Date of Marriage:** ____________________ **Date of Divorce:** ____________________

## DEPENDENTS:

Name: ______________ SSN: ______________ DOB: ________ Relationship________
Name: ______________ SSN: ______________ DOB: ________ Relationship________
Name: ______________ SSN: ______________ DOB: ________ Relationship________
Name: ______________ SSN: ______________ DOB: ________ Relationship________

## INCOME

**Please attach any statements and/or documentation for income from any of the sources listed below:**

| | Attached Yes/No | Payer | Amount |
|---|---|---|---|
| W-2 Form(s) | ________ | __________ | __________ |
| Interest Income (1099-INT) | ________ | __________ | __________ |
| Dividends (1099-DIV) | ________ | __________ | __________ |
| State tax refund (1099-G) | ________ | __________ | __________ |
| IRA Distribution (1099-R) | ________ | __________ | __________ |
| Pension/Annuity (1099-R) | ________ | __________ | __________ |
| Unemployment (1099-G) | ________ | __________ | __________ |
| Social Security (1099-SSA) | ________ | __________ | __________ |
| **(Go to SSA.gov for your statement)** | | | |
| Stock or Investment Statements | ________ | __________ | __________ |
| i.e. Morgan Stanley, ETrade, Country Financial etc. | | | |
| Foreign Income | ________ | __________ | __________ |
| Other (provide details) | ________ | __________ | __________ |

## ITEMIZED DEDUCTIONS

**Please provide any statements and/or documentation for any contributions or payments listed below:**

| | Attached Yes/No | Payer | Amount |
|---|---|---|---|
| Medical Expenses | ________ | __________ | __________ |
| Sales Tax (large items) | ________ | __________ | __________ |
| ****Real Estate Taxes** | ________ | __________ | __________ |
| Mortgage Interest (Home) (Must attach 1098) | ________ | __________ | __________ |
| Home Equity LOC (1098) | ________ | __________ | __________ |
| Charitable gifts (cash or check) | ________ | __________ | __________ |
| Charitable gifts (other) | ________ | __________ | __________ |
| Tax Preparation Fees | ________ | __________ | __________ |
| Safe Deposit Box- State Only | ________ | __________ | __________ |
| Other (provide details) | ________ | __________ | __________ |

****Attach Real Estate Bill with PIN**

## ADJUSTMENTS

**Please attach any statements and/or documentation for any contributions or payments listed below:**

| | Attached Yes/No | Payer | Amount |
|---|---|---|---|
| Health Savings Account | | | |
| IRA, 401k, SEP, Simple | | | |
| Student Loan Interest (1098-E) | | | |
| Tuition and Fees (1098-T) | | | |

## ESTIMATED PAYMENTS YOU MADE

| | Quarter 1 (4/21) | | Quarter 2 (6/21) | | Quarter 3 (9/21) | | Quarter 4 (1/22) | |
|---|---|---|---|---|---|---|---|---|
| | Date | Amount | Date | Amount | Date | Amount | Date | Amount |
| **Federal** | | | | | | | | |
| **State** | | | | | | | | |

## RENTALS

**Please attach any statements and/or documentation to support any of the items listed below:**

| | Property #1 | Property #2 | Property #3 *** |
|---|---|---|---|
| Rents Received | | | |
| **Expenses**: | | | |
| Advertising | | | |
| Auto/Travel | | | |
| Miles | | | |
| Cleaning/Maintenance | | | |
| Commissions | | | |
| Condo Fees | | | |
| Insurance | | | |
| Legal/Professional | | | |
| Mortgage Interest (1098) | | | |
| Other Interest | | | |
| Repairs | | | |
| Supplies | | | |
| ****Real Estate Taxes** | | | |
| Utilities | | | |

***If you have more then 3 Properties, please add additional information on the back of this page or add another page.

**** Real Estate Bill with PIN**

## HEALTH INSURANCE

Did you have health insurance? Yes ______ No ______

Please send in **1095-A, 1095-B, or 1095-C. Your tax return CANNOT be completed without a 1095**

## COMMENTS/QUESTIONS

___

___

___

___

___

You must keep paid bills and cancelled checks supporting the deductions you claim on this form for a period of **three (3) years** to comply with federal and state tax regulations and audit procedures. Do not claim as deductions any bills that have not been paid during the year unless they were charged to your credit card before year-end

Some Questions:

Are you a signatory on a Foreign Bank account? Yes______No_________

Do you have crypto currency? Please send statements
Yes_____No__________

Any funding from the Alaska Permanent fund Yes? Amount_________

Any interest on refunds from the IRS? Yes? Amount_________

We are encouraging Direct Deposit for any refunds

We will be needing a copy of your Driver License for 2022 tax returns. Those can be taken by phone and emailed to us if necessary. We suggest holding the license to capture your face and the driver's license.

## DISCLOSURE:

I have reviewed the information given to you on this form and to the best of my knowledge it is true, correct, and complete. I have maintained the underlying records required by law to support this information. I authorize Accounting EA, Inc. to prepare my personal income tax return based on this information and to retain copies of appropriate documents.

**PLEASE SIGN AND DATE:**

Name: ______________________________ Date: __________________

Name: ______________________________ Date: __________________

## NOTE: Your return CANNOT be prepared without your signature

# Authorized Disclosure and Opt-out Option

Accounting EA, Inc. has been engaged to prepare your 2022 U.S. Individual Federal Income Tax Return.

Our privacy policy and that of our firm is that without your written permission we do not disclose your tax information to anyone. This would include your banker, insurance advisor, financial advisor, as well as the Internal Revenue Service unless we are so ordered to release your tax information by a court ordered summons.

We do not disclose non-public personal information about our current or former customers to anyone, except as instructed to do so by such customers or as required by law. We restrict access to non-public personal information to our staff and those professionals who assist us in providing services to you. We maintain physical, electronic, and procedural safeguards to guard your non-public personal information.

Internal Revenue Code Section 7216 requires that taxpayers now give written approval before their tax information can be released to a third party. I am considered a third party and will require your written permission.

By signing the following you will give us permission as your tax preparer to release information about your 2022 tax return so we can do your tax return and properly advise you on tax and financial matters.

This information and acknowledgement are offered in order to be compliant with the Graham, Leach, Bliley Act as well as 7216.

You have the right to refuse to sign this agreement.

| | |
|---|---|
| ______________________ | ______________________ |
| Date | Taxpayer Signature |
| I, ______________________ | Opt-out to not have my information disclosed. |
| ______________________ | ______________________ |
| Date | Taxpayer Joint Signature |
| I, ______________________ | Opt-out to not have my information disclosed. |