

2022 Client Organizer

Wheeler's Tax Service
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PERSONAL INFORMATION

If filing status, dependents or contact information has changed from prior year, check here

Taxpayer

Legal First Name and Initial _____
Preferred Name _____
Last Name _____
Pronouns Used _____
Social Security No. _____
Date of Birth _____
Occupation _____
Home Phone _____
Work Phone _____
Other Phone _____
Email Address _____
Street Address _____
City _____ St _____ Zip _____
Driver's License/ID No. _____ State _____
Issued Date _____ Expiration Date _____

Spouse

Legal First Name and Initial _____
Preferred Name _____
Last Name _____
Pronouns Used _____
Social Security No. _____
Date of Birth _____
Occupation _____
Home Phone _____
Work Phone _____
Other Phone _____
Email Address _____
Street Address _____
City _____ St _____ Zip _____
Driver's License/ID No. _____ State _____
Issued Date _____ Expiration Date _____

If you moved during 2022, your previous address

OTHER QUESTIONS

- Yes No Are you or your spouse legally blind?
- Yes No Did you purchase health insurance through a public exchange? Include 1095-A
- Yes No Did you receive unemployment or disability income?
- Yes No Are you a member of the military? Please include your end of year LES
- Yes No Did you purchase, sell, or refinance any of your homes or take an equity loan?
- Yes No Did you convert a traditional/SEP/SIMPLE IRA to a Roth IRA?
- Yes No Did you, or will you, contribute to an IRA for 2022 outside of payroll contributions?
 _____Traditional _____Roth
- Yes No Did you take an early distribution from an IRA in 2020 for COVID Relief and spread it over 3 years?
- Yes No Can you be claimed as a dependent on another person's tax return?
- Yes No Did you make any clean energy home improvements or purchase an electric vehicle?
- Yes No Did you use any mortgage loan proceeds for purposes other than to buy, build or improve your home?
- Yes No Did you receive income from sharing/gig economy activity? (e.g. Airbnb, Uber, etc)
- Yes No Did you foreclose, file bankruptcy or have a repossession, debt forgiveness or debt consolidation procedures? Bring 1099-C
- Yes No Do you have any financial interest in a foreign bank account or foreign trust?
- Yes No Do you have any income from or did you live in a foreign country?
- Yes No Did you make any purchases from a catalog or internet and not pay sales tax?
- Yes No Did you have any education expenses for you or dependents?
- Yes No Have you purchased any Series I Bonds, Series EE Bonds or Treasuries in the last few years? If so, check your TreasuryDirect account for any 1099-INT statements.
- Yes No Do you expect any significant changes in income or deductions in 2023?

DIGITAL ASSETS

- Yes No Did you receive any digital assets as a payment for property or services provided?
- Yes No Did you receive any digital assets as a result of a reward or award?
- Yes No Did you receive any new digital assets as a result of mining, staking or similar activities?
- Yes No Did you receive any digital assets as a result of hard fork?
- Yes No Did you dispose of any digital assets in exchange for property or services?
- Yes No Did you dispose of any digital assets in exchange for another digital asset?
- Yes No Did you transfer any digital assets for free as a bona fide gift?
- Yes No Did you otherwise dispose of any financial interest in a digital asset?

ESTIMATED TAX PAYMENTS (if applicable)

	Federal	State
Prior Year - Jan 15, 2022		
1st Qtr - Apr 15, 2022		
2nd Qtr - June 15, 2022		
3rd QTR - Sep 15, 2022		
4th Qtr - Jan 18, 2022		
Total		

ADJUSTMENTS TO INCOME

Alimony Paid \$ _____
 Date of Divorce _____
 Name _____
 SSN _____

IRA/SEP Contribution Taxpayer \$ _____
 IRA/SEP Contribution Spouse \$ _____
 Student Loan Interest \$ _____
 Health Savings Account \$ _____

OTHER INCOME

Alimony Received \$ _____
 Date of Divorce _____
 Gambling/Lottery Winnings _____
 *bring W-2Gs \$ _____
 Jury Duty \$ _____
 Disability Income \$ _____
 State Inc Tax Refund \$ _____
 Other \$ _____

EDUCATION EXPENSES

Tuition Paid K-12 Private School \$ _____ Include statement from school & 1099-Q
 College Tuition Paid \$ _____ Include 1098-T, 1099-Q & Account Statement

Did you make any contributions to an Edvest or Tomorrow's Scholar Account? Yes No

Beneficiary	Amount
	\$ _____
	\$ _____
	\$ _____
	\$ _____

DAYCARE EXPENSES

Children cared for _____
 Was a Flex Spending Acct used to pay for some or all of the care expense?
 Amount paid \$ _____

Provider Name _____	Provider Name _____
Address _____	Address _____
SSN/EIN _____	SSN/EIN _____
Amount \$ _____	Amount \$ _____

INVESTMENTS SOLD

Bring all 1099-Bs and Confirmation Slips

Investment	Date Acq	Date Sold	Basis (Cost)	Sale Price

STATE INFORMATION

If rent paid \$ _____ Number of Months _____ Heat Inc? Yes No

