

# Tax Appointment Worksheet

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The Tax Appointment Worksheet is a tool to help you gather the needed information for new and returning clients for the 2022 tax year. This year's worksheet has been enhanced to reflect the changes in tax law. The energy credits will be a new focus. Some will apply to the current year; others will take effect later.

Driver's license/picture identification (ID) needed.

	Event	Documents or information needed		Event	Documents or information needed	
1	Married, divorced, or separated	<ul style="list-style-type: none"> <li>Married – Prior year return of both spouses</li> <li>Divorced – Finalized date; copy of the divorce decree</li> <li>Separated – Copy of the separate maintenance agreement</li> <li>Community property income allocation</li> </ul>	11	Purchase of stocks, bonds, etc., personal residence, or other real estate	Purchase documents; closing papers	
				12	Inheritance	Will, K-1 from the estate, Basis information
					Gifts made	Cash or property in excess of \$16,000 per person Description of property given; basis, donee name
2	Children – Birth or adoption	Social Security cards and adoption papers	13	Gifts received	Property – Basis of donor	
	Adoption credit	Expenses date and amount, date of adoption, special needs certification		Trade of real property	Date of trade; property given up and property received; basis; and FMV; qualified intermediary sales agreements or closing papers	
	Child tax credit, EIC, HH	Proof child lives in household, child's name on document		Personal property used for business that was traded in (ex.: Auto)	Date of trade, value received for trade. Cost basis of property given up	
3	Death of child or spouse	Date of death	14	Start or end a small business (Schedule C, LLC, S or C Corporation, partnership)	<ul style="list-style-type: none"> <li>Formation or termination dates</li> <li>Property contributions or distributions</li> <li>K-1s, if applicable</li> </ul>	
4	Additional members of household	Date of occupancy and relationship		Business income/expenses	<ul style="list-style-type: none"> <li>1099-Ks received for credit card or PayPal type payments</li> <li>Inventory numbers if applicable</li> <li>Mileage information</li> </ul>	
5	Job change	<ul style="list-style-type: none"> <li>Start date</li> <li>Name of new employer</li> <li>Form W-2 from new and old employers</li> </ul>		15	Lawsuit settlements	Date received; reason for the settlement; 1099-MISC
6	Unemployment	Unemployment form	16	Rental property	Income; expenses; new property purchased	
7	Retirement contribution	<ul style="list-style-type: none"> <li>Type of plan</li> <li>Amount of contribution</li> </ul>		17	Prizes	Form 1099-MISC; value of prizes not included on Form 1099-MISC
8	Retirement distributions	<ul style="list-style-type: none"> <li>Form 1099-R; rollovers, Roth Conversions, inheritance</li> <li>RMD information if age 72 or older</li> <li>Direct transfer to charity? Yes Amt:</li> <li>Brokerage statement showing transfer</li> </ul>				
9	Social Security benefits	Form 1099-SSA				
10	Sale of stocks, bonds, etc. (including mergers)	Form 1099-B or other sale documents; basis or original costs				

Event		Documents or information needed	Event		Documents or information needed	
18	Lottery or gambling winnings	<ul style="list-style-type: none"> <li>Total amount won whether on W-2G or not; total amount of losses</li> </ul>	24	Job-related expenses for employees	<ul style="list-style-type: none"> <li>No longer deductible</li> </ul>	
19	Health insurance, medical, dental, or drug expenses	<ul style="list-style-type: none"> <li>Health insurance premiums, post-taxed payments, totals of other medical, dental, and drug expenses. If the health insurance is pre-taxed (i.e., cafeteria plan, §125, POP), premiums have already been deducted from the wage. Health savings account (HSA) information.</li> </ul>	25	Business miles (58.5 cents per mile) January-June (62.5 cents per mile) July-December No longer allowable for employees; only for businesses and rentals	<ul style="list-style-type: none"> <li>Total miles driven per vehicle, January-June _____</li> <li>July-December _____</li> <li>Business miles driven per vehicle January-June _____</li> <li>July-December _____</li> </ul>	
	Medical miles (18 cents per mile) January-June (22 cents per mile) July-December	<ul style="list-style-type: none"> <li>Total medical miles driven during the year January-June _____</li> <li>July-December _____</li> </ul>		<ul style="list-style-type: none"> <li>Form 1098-T for parents or children. If the child is a student, the form will come to the child. Actual expense record to verify expenses for credit/deduction purpose.</li> <li>Financial transcript from school needed to show when actual expenses were paid.</li> <li>Form 10990 - Distribution from 529 Plans</li> </ul>		
	Market place health insurance coverage verification	<ul style="list-style-type: none"> <li>Form 1095 A, B, or C must be received from the marketplace, the insurance carrier, or your employer for every person included on the tax return.</li> </ul>		Student loan interest	<ul style="list-style-type: none"> <li>Interest record for student loans; Form 1098-E</li> </ul>	
20	State taxes income, property taxes paid, sales tax paid on vehicles, motorcycles, or homes	<ul style="list-style-type: none"> <li>Prior year's income tax return; property tax bills; closing papers from the purchase or sale of property; letter from the state regarding any change in a prior filed return.</li> </ul>	26	Child or disabled spouse care	<ul style="list-style-type: none"> <li>The name, address, and ID number of the day care provider; the amount paid to the provider; If the provider comes into your home, a W-2 may be required.</li> </ul>	
21	Home mortgage interest	<ul style="list-style-type: none"> <li>Forms 1098; Description of use of money, home equity interest no longer allowed</li> </ul>	27	Energy credit	<ul style="list-style-type: none"> <li>Information regarding the purchase of qualified energy property for residential and commercial use.</li> </ul>	
22	First-time homebuyer	<ul style="list-style-type: none"> <li>Distribution from IRA? Amt:</li> </ul>	28	Bankruptcy filing	<ul style="list-style-type: none"> <li>Date filed</li> <li>Bankruptcy papers - property rejected/returned by court</li> </ul>	
	Recapture/Repayment 2008 credit	<ul style="list-style-type: none"> <li>Sale or change in use; record of amount repaid</li> </ul>		29	Debt forgiveness or abandonment of property	<ul style="list-style-type: none"> <li>Form 1099-A for abandonment</li> <li>Date property was taken by the bank or sold in foreclosure</li> </ul>
23	Charitable contributions of money, property, or out-of-pocket expenses	<ul style="list-style-type: none"> <li>Date and type of contributions, knowledge that receipts from the organizations have been received; statement regarding whether goods and service were received for donation; mileage log for charitable work.</li> </ul>	30	IRS or state communications	<ul style="list-style-type: none"> <li>Letters, additional taxes paid, changes in prior year returns, installment agreements, or offers in compromise.</li> </ul>	
	Charitable miles (14 cents per mile)	<ul style="list-style-type: none"> <li>Total charitable miles driven</li> </ul>		31	Foreign investments or holdings	<ul style="list-style-type: none"> <li>Any foreign accounts? Total exceed \$10,000 at any time during the year?</li> <li>Foreign business interests or stock of \$50,000 or more?</li> <li>Signature authority over foreign accounts?</li> </ul>
	Transfers from IRA to charity for taxpayers over age 70.5	<ul style="list-style-type: none"> <li>Brokerage statement showing transfer</li> <li>1099-R</li> </ul>			32	Virtual currency (Cryptocurrency)