2022 Tax Organizer

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This Tax Organizer is designed to help you collect and report the information needed to prepare your 2022 income tax return. The attached worksheets cover income, deductions, and credits, and will help in the preparation of your tax return by focusing attention on your special needs.

Please enter your 2022 information in the designated areas on the worksheets. If you need to include additional information, you may use the back of a worksheet or an additional page.

When possible, 2021 information is included for your reference. You do not need to make any 2021 entries.

Note: The General Questions and Business/Investment Questions worksheets include a variety of questions designed to assist in completing your tax return. If you answer **yes** to any of the questions, be sure to provide the applicable details.

Please provide the following information:

- ☐ A copy of your 2021 tax return (if not in our possession).
- ☐ Original Form(s) W-2.
- ☐ Schedule(s) K-1 showing income or loss from partnerships, S corporations or estates or trusts.
- ☐ Copies of other compensation or pension documentation, such as Form 1099-MISC, Form 1099-R, Form 1099-NEC or Form 1099-K.
- ☐ Form(s) 1099 or statements reporting dividend and interest income.
- ☐ Brokerage statements showing transactions for stocks, bonds, etc.
- ☐ Form(s) 1098 reporting interest paid, copies of real estate tax bills and other information relating to real property holdings.
- ☐ Copies of closing statements regarding the sale or purchase of real property.
- ☐ Copies of invoices regarding residential clean energy improvements.
- ☐ All other information notices you received, or any items you have questions about.

Thank you for taking the time to complete this Tax Organizer.

2022
TAX ORGANIZER

Taxpayer Information		Spouse Information	
Last name		Last name	
First name		First name	
Middle Initial	Suffix	Middle Initial	Suffix
Social security number		Social security number	
Occupation		Occupation	
Work phone	Ext	Work phone	Ext
Cell phone		Cell phone	
E-mail address		E-mail address	
Date of birth		Date of birth	

Address .... ______ Apartment number....... ______

City .... ______ State........... ______ ZIP Code....... ______

Home phone........ ______ Fax number .... ______

Dependent Information

First name / Last name	MI / Suffix	Social Security Number / Relationship	Date of Birth	Months Lived with Taxpayer	Child Care Expense

Child and Dependent Care Provider Expenses

Name	Address	ID Number	Amount Paid

Education Tuition and Fees

Attach all Form 1098-Ts and a list of your qualified education expenses.

Student Loan Interest Paid

Enter total 2022 qualified student loan interest........ ______

Attach Form(s) W-2 – Wages, Salaries, Tips and Other Compensation

Employer Name	2021 Amount

Attach Form(s) 1099-R – Distributions from Pensions, Annuities, Retirement, Profit-Sharing, IRAs, etc

1099-R Payer Name	2021 Amount

Attach Form(s) SSA-1099 – Social Security/Railroad Benefits

	Taxpayer	Spouse
Social Security Benefits from Form SSA-1099		
Railroad Retirement Benefits from Form RRB-1099		
Medicare B premiums withheld		
Medicare C premiums withheld		
Medicare D premiums withheld		

Attach Form(s) 1099-MISC – Miscellaneous Income and 1099-NEC

1099-MISC Payer Name and 1099-NEC Payer Name

Attach Form(s) 1099-INT – Interest Income

1099-INT Payer Name	2021 Amount

Attach Form(s) 1099-DIV – Dividend Income

1099-DIV Payer Name	2021 Amount

Attach Form(s) 1099-B, 1099-S – Sales of Stocks, Bonds, Real Estate, etc

Attach all stock sale transaction information, including initial cost information.

Other Government Forms to attach:

Form(s) 1099-G – Certain Government Payments, Schedule K-1s – Partnership, S-Corporation, Trust or Estate Income, Form(s) W-2G – Gambling or Lottery Winnings, Form(s) 1099-Q – Payments from Qualified Education Programs

Other Income:

Alimony, jury duty, unreported tips, disability income, etc. Business, rentals, farms: Attach income and expenses for any business, rental or farm you own. Include a list of all new equipment acquired this year, including date of purchase and cost.

Retirement Plan Contributions

	Taxpayer	Spouse
Traditional IRA contributions made for 2022		
Roth IRA contributions made for 2022		
SEP, Keogh, Individual 401(k) or SIMPLE Contributions		

Medical and Dental Expenses

	2022 Amount	2021 Amount
Prescription medications		
Health insurance premiums		
Doctors, dentists, etc		
Hospitals, clinics, etc		
Eyeglasses and contact lenses		
Miles driven for medical purposes		
Other medical and dental expenses:		

Taxes

	2022 Amount	2021 Amount
Real estate taxes paid on principal residence		
Real estate taxes paid on additional homes or land		
Auto license registration fees based on the value of the vehicle		
Other personal property taxes		

Interest Expenses

Home mortgage interest paid — Attach Form(s) 1098.

Lender's Name	2022 Amount	2021 Amount

Points paid on loan to buy, build or improve main home

Lender's Name	2022 Amount

Cash/Check/Credit Contributions

	2022 Amount	2021 Amount

Noncash Charitable Contributions

Attach all receipts with details listing the following information: Donee, donee address, description of donation, date acquired and date contributed, your cost, value at time of donation, and how you acquired the property.

Miscellaneous Deductions

	2022 Amount	2021 Amount
Union and professional dues		
Professional subscriptions, books, supplies		
Uniforms and protective clothing (including cleaning)		
Job search costs		
Taxpayer educator expenses		
Spouse educator expenses		
Tax return preparation fees		
Safe deposit box rental		
Gambling losses (to the extent of gambling income)		
Other expenses (list):		

		Yes	No
1	Did a lender cancel any of your debt in 2022? (Attach any Forms 1099-A or 1099-C)	☐	☐
2	Did you make energy efficient improvements to your home or purchase any energy-saving property during 2022? If **yes,** please attach details	☐	☐
3	Did you purchase a motor vehicle or boat during 2022 ? If **yes,** attach documentation showing sales tax paid.	☐	☐
4	Did you purchase a hybrid or electric vehicle in 2022? If **yes,** enter year, make, model, and date purchased: ____________	☐	☐
5	Did you donate a vehicle in 2022? If **yes,** attach Form 1098C	☐	☐
6	What was the sales tax rate in your locality in 2022? ______ % State ID ____		
7	Did your marital status change during 2022? If **yes,** explain: ____________	☐	☐
8	Were you or your spouse permanently and totally disabled in 2022?	☐	☐
9	Do you have dependents who must file?	☐	☐
10	Do you have children who are under age 19 or a full time student under age 24 with investment income greater than $2,300?	☐	☐
11	Did you provide over half the support for any other person during 2022?	☐	☐
12	Did you incur adoption expenses during 2022 ?	☐	☐
13	Did you receive a total distribution from an IRA or other qualified plan that was partially or totally rolled over into another IRA or qualified plan within 60 days of the distribution?	☐	☐
14	Did you receive any disability payments in 2022?	☐	☐
15	Did you receive tip income **not** reported to your employer?	☐	☐
16 a	Did you buy, sell, refinance, foreclose or abandon a principal residence or other real property in 2022 ? If **yes,** attach closing or escrow statements, 1099-C or 1099-A forms	☐	☐
b	If you sold a home, did you claim the First-Time Homebuyer Credit when you purchased it?	☐	☐
17	Did you incur any casualty or theft losses during 2022 ?	☐	☐
18	Did you incur any non-business bad debts?	☐	☐
19	Did you pay any individual for domestic services in 2022 ?	☐	☐
20	Did you take a retirement account distribution related to the corona virus or a natural disaster?	☐	☐
21	Did you buy or sell any stocks or bonds in 2022 ?	☐	☐
22	Did you use the proceeds from Series EE or I U.S. savings bonds purchased after 1989 to pay for higher education expenses?	☐	☐
23	Did you incur any moving expenses? If **yes,** attach details	☐	☐
24	Did you receive any income not included in this Tax Organizer? If **yes,** please attach information.	☐	☐
25	Do you expect your income and deductions in 2023 to be the same as 2022 ? If **no,** attach explanation of changes expected.	☐	☐
26	Did you receive Form 1095-A (Health Insurance Marketplace Statement)? If so, please attach	☐	☐
27	At any time during 2022, did you sell, send, exchange, or otherwise acquire any financial interest in any virtual currency?	☐	☐
28	**a** Did you obtain a Paycheck Protection Program (PPP) loan?	☐	☐
	b If yes, has any portion of that loan been forgiven?	☐	☐
29	If you paid any alimony, enter recipient's SSN: ____________ Alimony paid: ____________		
30	Enter your state of residence **Taxpayer** ________ **Spouse** ________		
31 a	Do you want to change the language with which the IRS communicates with you?	☐	☐
b	If yes, which language? ____________		

Electronic Filing and Direct Deposit of Refund

	Yes	No
If your tax return is eligible for Electronic Filing, would you like to file electronically?	☐	☐
The Internal Revenue Service is able to deposit many refunds directly into taxpayers' accounts. If you receive a refund, would you like direct deposit?	☐	☐

If **yes,** please provide a voided check (not a deposit slip) if your bank account information has changed.

What type of account is this? Checking ☐ Savings ☐

Estimated Tax Paid

Federal		State			Local		
Date	Amount	Date	Amount	ID	Date	Amount	ID

Additional Information (Enter any additional information here and attach any documents.)

General Questions

PERSONAL INFORMATION

		Yes	No
1	Did your marital status change during 2022? If **yes,** explain ________	☐	☐
2	Do you want to allow your tax preparer to discuss this year's return with the IRS? If **no,** enter another person (if desired) to be allowed to discuss this return with the IRS. **Caution:** Review any transferred information for accuracy. Designee's Name ► ________ Phone Number ► ________ Personal Identification Number (5 digit PIN) ► ________	☐	☐
3	Do you or your spouse plan to retire in 2023?	☐	☐
4	Were you or your spouse permanently and totally disabled in 2022?	☐	☐
5	Enter date of death for taxpayer or spouse (if during 2022 or 2023): Taxpayer: ________ Spouse: ________		
6	Were you or your spouse a member of the U.S. Armed Forces during 2022?	☐	☐

DEPENDENT INFORMATION

		Yes	No
7 a	Do you have dependents who must file?	☐	☐
b	If **yes,** do you want us to prepare the return(s)?	☐	☐
8 a	Do you have children who are under age 19 or a full time student under age 24 with investment income greater than $2,300?	☐	☐
b	If **yes,** do you want to include your child's income on your return?	☐	☐
9	Are any of your dependents **not** U.S. citizens or residents?	☐	☐
10	Did you provide over half the support for any other person during 2022?	☐	☐
11	Did you incur adoption expenses during 2022?	☐	☐

IRA, PENSION AND EDUCATION SAVINGS PLANS

		Yes	No
12	Did you take a retirement account distribution related to the corona virus or a natural disaster?	☐	☐
13	Did you receive payments from a pension or profit-sharing plan?	☐	☐
14	Did you receive a total distribution from an IRA or other qualified plan that was partially or totally rolled over into another IRA or qualified plan within 60 days of the distribution?	☐	☐
15a	Did you convert all or part of a regular IRA into a Roth IRA?	☐	☐
b	Did you roll over all or part of a qualified plan into a Roth IRA?	☐	☐
16	Did you contribute to a Coverdell Education Savings Account?	☐	☐

ITEMS RELATED TO INCOME/LOSSES

		Yes	No
17	Did you receive any disability payments in 2022?	☐	☐
18	Did you receive tip income **not** reported to your employer?	☐	☐
19a	Did you buy, sell, refinance, or abandon a principal residence or other real property in 2022? (Attach copies of any escrow statements or Forms 1099.)	☐	☐
b	If you sold or abandoned a home, did you claim the First-Time Homebuyer Credit when you purchased the home?	☐	☐
c	Are you planning to purchase a home soon?	☐	☐
20	Did you incur any casualty or theft losses during 2022?	☐	☐
21	Did you incur any non-business bad debts?	☐	☐

PRIOR YEAR TAX RETURNS

		Yes	No
22	Were you notified by the Internal Revenue Service or state taxing authority of changes to a prior year's return? If **yes,** enclose agent's report or notice of change.	☐	☐
23	Were there changes to a prior year's income, deductions, credits, etc which would require filing an amended return?	☐	☐

General Questions (continued)

FOREIGN BANK ACCOUNTS, FOREIGN ASSETS AND FOREIGN TAXES

		Yes	No
24	Did you have foreign income or pay any foreign taxes in 2022 ?	☐	☐
25 a	At any time during 2022 , did you have an interest in or a signature or other authority over a bank account, or other financial account in a foreign country?	☐	☐
b	Did the aggregate value of all your foreign accounts exceed $10,000 at any time during 2022 ? Report all interest income on Org 11	☐	☐
26	Were you the grantor of or transferor to a foreign trust which existed during the tax year, whether or not you have any beneficial interest in the trust?	☐	☐
27	Did you at any time during 2022, have an interest in or any authority over any foreign accounts or assets (i.e. stocks, bonds, mutual funds, partnership interests, etc.) held in foreign financial institutions that exceeded $50,000 in value at any time during the year?	☐	☐

HEALTH AND LIFE INSURANCE

		Yes	No
28	Did you receive Form 1095-A (Health Coverage)? If so, please attach	☐	☐
29 a	Did you or your spouse have self-employed health insurance?	☐	☐
b	If you or your spouse are self-employed, are either of you eligible to participate in an employer's health plan at another job?	☐	☐
30	Did your employer pay premiums on life insurance in excess of $50,000 where the proceeds are payable to beneficiaries named by you?	☐	☐
31	Did you contribute to or receive distributions from a Health Savings Account (HSA)?	☐	☐

MISCELLANEOUS

		Yes	No
32	Did you make energy efficient improvements to your home or purchase any energy-saving property during 2022 ? If **yes,** please attach details	☐	☐
33	Did you start paying mortgage insurance premiums in 2022 ? If **yes,** please attach details	☐	☐
34	Did you purchase a motor vehicle or boat during 2022 ? If **yes,** attach documentation showing sales tax paid.	☐	☐
35	Did you purchase an energy efficient vehicle in 2022 ? If **yes,** enter year, make, model, and date purchased: ______	☐	☐
36	Did you donate a vehicle in 2022 ? If yes, attach Form 1098C	☐	☐
37	What was the sales tax rate in your locality in 2022 ? ______ % State ID .... ____		
38	Did you or your spouse make gifts of over $16,000 to an individual or contribute to a prepaid tuition plan?	☐	☐
39	Did you make gifts to a trust?	☐	☐
40	If there were dues paid to an association, was any portion required to be non-deductible due to political lobbying by the association? If **yes,** please attach details.	☐	☐
41	Did you or your spouse participate in a medical savings account in 2022? If **yes,** please attach Form 1099-SA (Distributions from an HSA, Archer MSA or Medicare+Choice MSA.)	☐	☐
42	Did you make a loan at an interest rate below market rate?	☐	☐
43	Did you pay any individual for domestic services in 2022 ?	☐	☐
44	Did you pay interest on a student loan for yourself, your spouse, or your dependents?	☐	☐
45	Did you, your spouse, or your dependents attend post-secondary school in 2022 ?	☐	☐
46	Did a lender cancel any of your debt in 2022 ? (Attach any Forms 1099-A or 1099-C)	☐	☐
47	Did you receive any income not included in this Tax Organizer? If **yes,** please attach information.	☐	☐
48	At any time during 2022, did you sell, send, exchange, or otherwise acquire any financial interest in any virtual currency?	☐	☐
49 a	Did you obtain a Paycheck Protection Program (PPP) loan?	☐	☐
b	If yes, has any portion of that loan been forgiven?	☐	☐
50 a	Do you want to change the language with which the IRS communicates with you?	☐	☐
b	If yes, which language? ______		

ELECTRONIC FILING AND DIRECT DEPOSIT OF REFUND

		Yes	No
51	If your tax return is eligible for Electronic Filing, would you like to file electronically?	☐	☐
52	The Internal Revenue Service is able to deposit many refunds directly into taxpayers' accounts. If you receive a refund, would you like direct deposit?	☐	☐

Caution: Review transferred information for accuracy.

53 If **yes,** please provide the following information:

a Name of your financial institution ______

b Routing Transit Number (must begin with 01 through 12 or 21 through 32) ______

c Account number ______

d What type of account is this? Checking ☐ Savings ☐

☑ Please attach a **voided** check (not a deposit slip) if your bank account information has changed.

Health Insurance Coverage

Preparer note: The fields on this form are non-enterable. This worksheet is meant to gather client data only. This worksheet will not transfer to the ProSeries/1040 product. Data from this worksheet must be manually entered on the appropriate form in ProSeries/1040.

Part 1 **Coverage**

Enter the name, SSN/DOB and health insurance status for each person who will claim on your return in the table below:

Name of covered individual(s)	SSN or DOB	Covered 12 mos	Exchange Policy	Exemption Received	Indicate which months each person was covered by MEC*: Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
1.																
2.																
3.																
4.																
5.																
6.																
7.																
8.																
9.																

*Minimum Essential Coverage (MEC) includes employer-sponsored coverage, health insurance purchased through the Health Insurance Marketplace (Exchange), Medicare, Medicaid, certain VA coverage, Tricare, etc.

For tax year 2020, the Federal ACA tax penalty has been eliminated, however, you may still be subject to a state tax penalty depending on where you live because some states have created their own individual insurance mandates to replace the federal version. These mandates require state residents to have qualifying health coverage or pay a fee with their state taxes.

Use this worksheet to list the names of individuals listed on the income tax return and their health care insurance coverage status. It will help your tax preparer determine who has health insurance coverage.

If you purchased a health insurance policy from an exchange (or Marketplace), check the Exchange Policy box above. You will receive Form 1095-A from the exchange that issued your policy. Please provide this form with your Organizer documents to your tax preparer.

Please call with any questions on this worksheet.

Business/Investment Questions

		Yes	No
1	Did you receive stock from a stock bonus plan with your employer? (Do not include stock sales included on your W-2.)	☐	☐
2	Did you buy or sell any stocks or bonds in 2022? If **yes**, attach broker's information (such as Form 1099-Bs and broker annual statements) related to the transactions.	☐	☐
3	Did you surrender any U.S. savings bonds during 2022?	☐	☐
4	Did you use the proceeds from Series EE or I U.S. savings bonds purchased after 1989 to pay for higher education expenses?	☐	☐
5	Did you realize a gain or loss on property which was taken from you by destruction, theft, seizure, or condemnation?	☐	☐
6	Did you start a business, purchase a rental property or farm, or acquire interests in partnerships or S corporations?	☐	☐
7	Do you have any investments for which you were **not** personally 'at risk' (other than sole proprietorship or farm)?	☐	☐
8	Did you own an interest in a Real Estate Mortgage Investment Conduit (REMIC) during 2022?	☐	☐
9	Did you sell property or equipment on installment in 2022?	☐	☐
10	Did you have any business related educational expenses?	☐	☐
11	Did you do a 'like-kind' exchange of property in 2022?	☐	☐
12	Deductions for travel and meals may be allowed under certain circumstances. Adequate records must be presented. Information must include: **1** Amount; **2** Time and place; **3** Date; **4** Business purpose; **5** Description of gift(s); and **6** Business relationship of recipient. Do you have records to support expenses?	☐	☐
13	Did you purchase special fuels for non-highway use? If **yes**, please list the type of use and the number of gallons for each fuel.	☐	☐

Car And Truck Expenses

(Employees use ORG17 – Employee Business Expenses)

ORG18

GENERAL INFORMATION-	Vehicle 1	Vehicle 2	Vehicle 3
1 Description of vehicle			
2 a Date placed in service			
b Date acquired, if different from line 2a			
3 Enter detail on lines 3a and 3b, or total on line 3c:			
a Ending mileage reading			
b Beginning mileage reading			
c **Total miles** for the year (line 3a less line 3b)			
4 a Business miles 01/01/2022 thru 06/30/2022			
b Business miles 07/01/2022 thru 12/31/2022			
5 Total commuting miles			

STANDARD MILEAGE RATE	Vehicle 1	Vehicle 2	Vehicle 3
6 Do you qualify for standard mileage? **(Preparer Use)**	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No
7 Is this a leased vehicle?	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No

ACTUAL EXPENSES	Vehicle 1	Vehicle 2	Vehicle 3
8 Gasoline, oil, repairs, insurance, etc			
9 Vehicle registration fee (excluding property tax)			
10 Vehicle lease or rental fee			
11 Inclusion amount **(Preparer Use Only)**			
12 Depreciation **(Preparer Use Only)**			
13 Parking fees, tolls, and local transportation			
14 Portion of vehicle registration fee based on value			
15 Interest on vehicle			

DEPRECIATION/DISPOSITIONS	Vehicle 1	Vehicle 2	Vehicle 3
16 Cost or basis			
17 Is this an electric vehicle?	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No
18 Is this qualified Indian reservation property?	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No
19 Type of vehicle **(Preparer Use)**			
20 Section 179 expense **(Preparer Use)**			
21 Qualified Property for Economic Stimulus? **(Preparer Use)**	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No
22 Qualified Property for Qualified Disaster Area? **(Preparer Use)**	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No
23 Kansas Disaster Zone? **(Preparer Use)**	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No
24 Qualified GO Zone Property **(Preparer Use)**	☐ Reg ☐ Ext ☐ N/A	☐ Reg ☐ Ext ☐ N/A	☐ Reg ☐ Ext ☐ N/A
25 Percentage for SDA? **(Preparer Use)**	☐ 100%/50% ☐ 30% ☐ No	☐ 100%/50% ☐ 30% ☐ No	☐ 100%/50% ☐ 30% ☐ No
26 Elect OUT of SDA? **(Preparer Use)**	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No
27 Elect 30% in place of 50% SDA **(Preparer Use)**	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No
28 Date sold			
29 Sales price			
30 Expense of sale			
31 Gain/loss basis, if different **(Preparer Use)**			
32 AMT gain/loss basis, if different **(Preparer Use)**			

VEHICLE QUESTIONS	Vehicle 1	Vehicle 2	Vehicle 3
33 Is another vehicle available for personal use?	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No
34 Was vehicle available during off duty hours?	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No
35 Was vehicle used primarily by a greater than 5% owner or related person?	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No
36 Do you have evidence to support the business use claimed?			☐ Yes ☐ No
37 If **yes,** is the evidence written?			☐ Yes ☐ No

Business Income and Expenses

GENERAL INFORMATION

Is this activity a qualified trade or business under Section 199A? ☐ Yes ☐ No

1 Check ownership ☐ **Taxpayer** ☐ **Spouse** ☐ **Joint**

2 Business name ____

3 a Business street address ____

b 1 City, State and Zip Code, **or** ____

2 Foreign country ____

4 Principal business/profession ____

5 Employer ID number ____

6 Business code **(Preparer Use Only)** ____

	Yes	No
7 Was this business fully disposed of in a fully taxable transaction during 2022 ?	☐	☐

8 Accounting method:
Cash ☐ Accrual ☐ Other (specify) ☐ ____

9 Method used to value closing inventory:
Cost ☐ Lower of cost or market ☐ Other (explain) ☐ ____

	Yes	No
10 Was there a change in determining quantities, costs, or valuations between opening/closing inventory? (If yes, attach explanation)	☐	☐
11 Did you materially participate in the operation of this business during 2022 ?	☐	☐
12 Did you start or acquire this business during 2022 ?	☐	☐
13a Did you make any payments in 2022 that require you to file Forms 1099?	☐	☐
b If yes, did you or will you file all the required Forms 1099?	☐	☐
14 At-risk determination:		
a Is all of the investment in this activity at risk?	☐	
b Is some of the investment in this activity not at risk?	☐	
15 Did you have unallowed passive losses in 2021 ?	☐	☐
16a Treat all MACRS assets for this activity as qualified Indian reservation property?	☐	☐
b Treat all assets acquired after August 27, 2005 as qualified GO Zone property? **Regular** ☐ **Extension** ☐ **No**		☐
c Treat all assets acquired after May 4, 2007 as qualified Kansas Disaster Zone property?	☐	☐
d Was this business located in a Qualified Disaster Area?	☐	☐

Complete ORG51 for Asset Acquisitions and ORG50 for Dispositions.

INCOME	2022	2021
17 Gross receipts or sales		
18 Returns and allowances plus other adjustments		
19 Other income (include federal/state gas tax credit/refund)		

COST OF GOODS SOLD – IF APPLICABLE	2022	2021
20 Inventory at beginning of year		
21 Purchases		
22 Items withdrawn for personal use		
23 Cost of labor (do not include your salary)		
24 Materials and supplies		
25 Other costs		
26 Inventory at end of year		

Business Income and Expenses (continued)

EXPENSES	2022	2021
Business name		
27 Advertising		
28 Car and truck expenses (complete ORG18)		
29 Commissions and fees		
30 Contract labor		
31 Depletion		
32 Depreciation and Section 179 deduction **(Preparer Use Only)**		
33 Employee benefit programs:		
a Employee health insurance premiums		
b Other employee benefit programs		
34 Insurance (other than health)		
35 Self-employed health insurance attributable to this business		
36 Interest:		
a Mortgage paid to banks not reported to you on Form 1098		
b Other		
37 Legal and professional services		
38 Office expenses		
39 Pension and profit-sharing plans		
40 Rent or lease:		
a Machinery and equipment (enter vehicle lease on ORG18)		
b Other business property		
41 Repairs and maintenance		
42 Supplies (not included in cost of goods sold)		
43 Taxes and licenses not reported to you on Form 1098		
44 Travel and meals		
a Travel		
b Meals subject to 50% limit		
c Meals subject to 80% limit		
d Meals not subject to limit		
45 Utilities		
46 Gross wages		
47 Other expenses:		
48 Expenses for business use of your home **(Preparer Use Only)** Complete ORG20 for Business Use of Home.		
49 Qualified pension plan start-up costs		
50 DPAD (line 6) from cooperative(s) with tax year beginning **before** Jan. 1, 2018		
51 DPAD (line 6) from cooperative(s) with tax year beginning **after** Dec. 31, 2017		

Business Use of Home

ORG20

for:

copy:

Simplified method election for Home Office expenses: Elect the simplified method **in 2020** instead of entering actual expenses ☐

Elected the simplified method **in 2019** instead of entering actual expenses ☐

	GENERAL INFORMATION	2022	2021
1	Area used regularly and exclusively for business, regularly and exclusively for day care, or regularly for inventory storage (square footage)		
2	Area used only partly for day care (square footage)		
3	Total area of home (square footage)		
4	Daycare hours		
a	Number of weeks used for day care, if less than full year		
b	Number of days used for day care each week		
c	Number of days closed for holidays, vacations, etc		
d	Number of hours used for day care each day		
e	Total hours used for day care		
f	Total hours available for use		
5	Enter the date you began using this home office for this business		
6	If part of your income is from a place of business other than this home, enter % of gross income from business use of this home		
7	Adjustment to gain from business use of home shown on Schedule D or Form 4797 **(Preparer Use Only)**		
8	Adjustment to losses from this business shown on Schedule D or Form 4797 **(Preparer Use Only)**		

Enter expenses that benefit only your business area in the 'Direct' column and expenses that benefit your entire home in the 'Indirect' column.

	EXPENSES	2022 Direct	2022 Indirect	2021 Direct	2021 Indirect
9	Casualty losses **(Preparer Use Only)**				
10	Total mortgage interest/points				
11	Mortgage interest/points on Form 1098				
12	Interest **not** on Form 1098				
13	Points **not** of Form 1098				
14	Real estate taxes				
15	Excess mortgage interest **(Preparer Use)**				
16	Excess real estate taxes **(Preparer Use)**				
17	Qualified mortgage insurance				
18	Other insurance				
19	Rent				
20	Repairs and maintenance				
21	Utilities				
22	Other expenses (e.g., rent)				
23	Carryover of operating expenses				
24	Excess casualty losses **(Preparer Use Only)**				
25	Depreciation of your home **(Preparer Use Only)**				
26	Carryover of excess casualty losses and depreciation				

DEPRECIATION

If your home and any additions or improvements to your home are not already listed on ORG50 for this business, please complete the following information.

26	Description	Date Acquired (MM/DD/YY)	Date Placed in Service (MM/DD/YY)	Cost (include land for residence only)
	Residence			
	Addition/Improvement			
	Addition/Improvement			
	Addition/Improvement			
	Addition/Improvement			
27	Enter the land value included in cost for residence			

Rent and Royalty Income and Expenses

ORG25

BASIC PROPERTY INFORMATION

Property description: ______

Property type: * ______ If type is other, enter a description: ______

Location (street address): ______

City: ______ State: __ Zip: ______

If a foreign address: Foreign province or state: ______

Foreign postal code: ______ Foreign Country: ______

Is this activity a qualified trade or business under Section 199A? ☐ Yes ☐ No

		Yes	No
1	Check property owner ☐ **Taxpayer** ☐ **Spouse** ☐ **Joint**		
2 a	Did you make any payments that would require you to file Form(s) 1099?	☐	☐
b	If **yes,** did you or will you file all required Forms(s) 1099?	☐	☐
3 a	Enter the ownership percentage (if not 100%) ______		
b	If not 100%, are you reporting 100% of the income and expenses?	☐	☐
4	Is this a rental property? (If **yes,** answer questions 5 through 11; if **no,** skip to question 12.)	☐	☐
5	Did you have personal use of this property or rent it for part of the year at less than fair rental value?	☐	☐
6	For all rental properties, **enter the number of days** during 2022 that:		
a	The property was rented at fair rental value ______		
b	The property was used personally or rented at less than fair rental value ______		
c	You owned the property, if not the entire year ______		
7 a	Does this rental have multiple living units and you live in one of the units?	☐	☐
b	If **yes,** enter percentage of rental use ______		
8	Did you actively participate in this property's management during 2022 ?	☐	☐
9	Did you materially participate in this property's management during 2022 ?	☐	☐
10	Do you want to treat this property as non-passive?	☐	☐
11	Did this property have unallowed passive losses in 2021 ?	☐	☐
12	Did you dispose of this property in a fully taxable transaction?	☐	☐
13	Check this box if some of this investment was **not** at-risk	☐	
14 a	Treat all MACRS assets for this activity as qualified Indian reservation property?	☐	☐
b	Treat all assets acquired after August 27, 2005 as qualified GO Zone property? **Regular** ☐ **Extension** ☐		**No** ☐
c	Treat all assets acquired after May 4, 2007 as qualified Kansas Disaster Zone property?	☐	☐
d	Was this activity located in a Qualified Disaster Area?	☐	☐

Complete ORG51 for Asset Acquisitions and ORG50 for Dispositions.

	INCOME	2022	2021
15	Rents or royalties received		

*** Property Types:**

1 Single family residence
2 Multi-family residence
3 Vacation/short-term rental
4 Commercial
5 Land
6 Royalties
7 Self-rental
8 Other

Rent and Royalty Income and Expenses (continued)

EXPENSES		2022	2021
	Property location		
16	Advertising		
17a	Automobile (complete ORG18 for autos)		
b	Travel		
18	Cleaning and maintenance		
19	Commissions		
20a	Mortgage insurance premiums – qualified		
b	Other insurance		
21	Legal and professional fees		
22	Management fees		
23a	Mortgage interest paid to banks – qualified		
b	Mortgage interest paid to banks – other		
24	Other interest		
25	Repairs		
26	Supplies		
27a	Real estate taxes		
b	Other taxes		
28	Utilities		
29	Other expenses:		
a			
b			
c			
d			
e			
30a	Depreciation and Section 179 deduction **(Preparer Use Only)**		
b	Depletion **(Preparer Use Only)**		

Education Information

EDUCATION TUITION AND FEES

Attach all Form 1098-Ts and a list of your qualified expenses.

EDUCATOR EXPENSES	2022	2021
1 a Taxpayer educator expenses		
b Spouse educator expenses		

STUDENT LOAN INTEREST PAID

Student Loan Interest Reported on a 1098-E in 2022

2 a Enter detail below or total interest in Part 2b

Lender's Name	2022	2021

Total Student Loan Interest	2022	2021
2 b Enter the total interest paid on qualified student loans		

FORM 1099-Q

3 Enter 1099-Q detail below.

State Code	Name of Payer or Program	Gross Distribution Box 1	Earnings Box 2	* Type Box 5

* For the Type Code, enter the following:

P = Private Qualified Tuition Program
S = State Qualified Tuition Program
E = Coverdell ESA

Tax Payments

2022 ESTIMATED TAX PAYMENTS

	Federal		State			Local		
	Date	Amount	Date	Amount	ID	Date	Amount	ID
1 Qtr 1 due by 04/15/22								
2 Qtr 2 due by 06/15/22								
3 Qtr 3 due by 09/15/22								
4 Qtr 4 due by 01/18/23								
5 a Additional payments ...								
b Additional payments ...								
c Additional payments ...								
d Additional payments ...								

OTHER TAX PAYMENTS

	Federal	State	Local
6 2021 overpayment applied to 2022			
7 Balance due paid with 2021 return			
8 a 2021 Quarter 4 payments paid in 2022			
b 2021 extension payments paid in 2022			
9 Other taxes paid in 2022 for prior years (include explanation)			

2023 ESTIMATED TAX WORKSHEET

If you expect any significant change in your income or expenses in 2023, please enter the increase or decrease below.

Income

10 Wages .... Taxpayer .... ____________
Spouse .... ____________

11 Self-Employment Income .... Taxpayer .... ____________
Spouse .... ____________

12 Capital Gains (sale of stock, real estate, etc) .... ____________

13 Other Income:
Description .... ____________ ____________

Deductions

14 Allowable Itemized Deductions .... ____________

15 Other deductions (such as alimony paid, early withdrawal penalties, etc):
Description .... ____________ ____________

16 Federal Withholding .... ____________

17 Number of personal exemptions expected for 2023 .... ____________

ADDITIONAL INFORMATION

18 Check to use your 2022 tax amount for your 2023 estimate .... ☐

19 If you have an overpayment of 2022 taxes, check the box to indicate how you want your overpayment applied.

a Apply entire overpayment to next year and refund excess .... ☐

b Apply entire overpayment to first quarter and refund excess .... ☐

20 Amount to apply if not entire overpayment .... ____________

21 Number of installments for estimated tax (1 - 4) .... ____________