

2022	1040	US	Tax Organizer
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**Sullivan & Company, CPAs**  
**4709 Montgomery Lane Ste 201**  
**Bethesda MD 20814**

Telephone number: **(301) 657-8080**  
 Fax number: **(301) 657-9055**  
 E-mail address:

**Tax Return Appointment**

Date:  
 Time:  
 Location:

This tax organizer will assist you in gathering information necessary for the preparation of your 2022 tax return. Please enter all pertinent 2022 information.

NOTE: If you claim the earned income credit, please provide proof that your child is a resident of the United States. This proof is typically in the form of: school records or statement, landlord or property management statement, health care provider statement, medical records, child care provider records, placement agency statement, social service records or statement, place of worship, Indian tribal office statement, or employer statement.

NOTE: If your child is disabled, please provide one of the following forms of proof of disability: doctor statement, other health care provider statement, or social services agency or program statement.

**CLIENT INFORMATION**

Taxpayer

Spouse

First name and initial . . . . .		
Last name . . . . .		
Title/suffix . . . . .		
Social security number . . . . .		
Occupation . . . . .		
Date of birth (m/d/y) . . . . .		
Date of death (m/d/y) . . . . .		
1=blind . . . . .		
Home phone . . . . .		
Work phone . . . . .		
Work extension . . . . .		
Cell phone . . . . .		
E-mail address . . . . .		

Address	In care of . . . . .	
	Street address . . . . .	
	Apartment number . . . . .	
	City . . . . .	
	State . . . . .	
	ZIP code . . . . .	

**DEPENDENTS**

Dependent No.

Dependent No.

First name . . . . .		
Last name . . . . .		
Title/suffix . . . . .		
Date of birth (m/d/y) . . . . .		
Date of death (m/d/y) . . . . .		
Date of adoption (m/d/y) . . . . .		
Social security number . . . . .		
Relationship . . . . .		
Months lived at home . . . . .		

Dependent No.

Dependent No.

First name . . . . .		
Last name . . . . .		
Title/suffix . . . . .		
Date of birth (m/d/y) . . . . .		
Date of death (m/d/y) . . . . .		
Date of adoption (m/d/y) . . . . .		
Social security number . . . . .		
Relationship . . . . .		
Months lived at home . . . . .		

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## Miscellaneous Questions

If any of the following items pertain to you or your spouse for 2022, please check the appropriate box and provide additional information if necessary.

- | Yes                      | No                       |  |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Did your marital status change during the year?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Did your address change during the year? If yes, please provide your current address.  |
| <input type="checkbox"/> | <input type="checkbox"/> | Could you be claimed as a dependent on another person's tax return for 2022?   |
| <input type="checkbox"/> | <input type="checkbox"/> | Were there any changes in your dependents? If yes, please let us know.   |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have any children under age 19 or full-time students under age 24 at the end of 2022, with interest and dividend income in excess of \$1,150, or total investment income in excess of \$2,300? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have any interest or dividend income in 2022? If yes, please provide applicable Forms 1099-INT or 1099-DIV.  |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you cash any Series EE U.S. savings bonds issued after 1989 and pay qualified higher education expenses for yourself, your spouse, or your dependents?   |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive, sell, send, exchange or otherwise acquire any financial interest in virtual currency, such as Bitcoin, Ethereum, Dogecoin, et.c?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you buy or sell any stocks, bonds or other investment property in 2022? If yes, please provide applicable Forms 1099.  |
| <input type="checkbox"/> | <input type="checkbox"/> | Do you own any stocks that became worthless during the year? If yes, please provide details.   |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have any business income or expenses in 2022? If yes, please provide summary of income and expenses.   |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have ownership interest in a partnership or S-Corporation during 2022? If yes, please provide Schedule K-1 for each entity you owned.  |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have any rental income in 2022? If yes, please provide summary of rental income and expenses.  |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive any royalty income in 2022? If yes, please provide applicable Form 1099-MISC.  |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you become a beneficiary of a trust or an estate?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive any unemployment compensation or disability income?  |

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## Miscellaneous Questions

- |                          |                          |  |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive any Social Security benefits in 2022? If yes, please provide Form SSA-1099.  |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive or pay alimony in 2022? If yes, please provide the amount of alimony and date of divorce.  |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you make a contribution to a retirement plan (401(k), IRA, SEP, SIMPLE, TSP, Qualified Plan, etc.)? (IRA contributions for 2022 can be made up to the due date of your tax returns.)                                   |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive a distribution from a retirement plan (401(k), IRA, SEP, SIMPLE, TSP, Qualified Plan, etc.)?   |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive a distribution from your retirement plan because of COVID in 2020 and elected to defer the tax on those or repaid it during 2022?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you transfer or rollover any amount from one retirement plan to another retirement plan?   |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you convert part or all of your traditional, SEP, or SIMPLE IRA to a Roth IRA in 2022?   |
| <input type="checkbox"/> | <input type="checkbox"/> | Did anyone owe you money which has become legally uncollectible?   |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have any debts canceled or forgiven?   |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have any gambling winnings?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have any other sources of income besides the W-2s, 1099s, etc. that you provided us? For example: settlement proceeds.   |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have significant medical expenses in 2022?   |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have health insurance coverage for all 12-months?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have Long Term Care insurance in 2022? If yes, please provide your annual premium.   |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have health insurance through the Exchange or the Marketplace? If yes, please attach Form 1095-A.  |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you purchase, sell, or refinance your principal home or second home, or did you take a home equity loan? If yes, please provide any settlement sheet or closing disclosures that you received.                         |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have a mortgage on your home or other real estate property owned? If yes, please provide all Forms 1098 for each property. If you refinanced the mortgage during the year, there would be more than one Form 1098. |
| <input type="checkbox"/> | <input type="checkbox"/> | If you had a balance due with your prior year tax return, did you pay all tax due in 2022?   |

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## Miscellaneous Questions

- |                          |                          |  |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Did you pay any personal property tax on your car? If yes, please provide the amount.  |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you make any estimated tax payments for 2022? If yes, provide amounts and dates when paid.   |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you make any charitable donations during 2022? If yes, please provide amounts of such donations.   |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you make Qualified Charitable Donation directly from your IRA?   |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you make any non-cash charitable donations during 2022, such as clothing, furniture, etc.? If yes, please provide receipts listing such donations and their value.       |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you engage the services of any household employees, such as a nanny, cleaning person, etc.?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you pay for childcare costs for dependent child under age 13, or your spouse during 2022? If yes, please provide information of care provider and the amounts paid.      |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you, your spouse, or a dependent incur any tuition expenses that are required to attend a college, university, or vocational school? If yes, please provide Form 1098-T. |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you make a contribution to any 529 plan (College Savings Plan)? If yes, please indicate which state is your 529 plan with and the amount you contributed in 2022.        |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive a distribution from a 529 plan (College Savings Plan)? If yes, please provide Form 1099-Q.   |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you pay any student loan interest during 2022? If yes, please provide Form 1098-E.   |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you or your employer make a contribution to a Health Savings Account in 2022?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive a distribution from your Health Savings Account in 2022? If yes, please provide Form 1099-SA.  |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you make any residential energy-efficient improvements or purchases involving solar, wind, geothermal or fuel cell energy sources?                                       |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you incur a loss because of damaged or stolen property?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you incur a loss of property in a federal declared disaster area?  |

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## Miscellaneous Questions

- |                          |                          |  |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Did you make a gifts to an individual more than \$16,000, or a gift to a trust in 2022?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive a gift or inheritance of money or other property from an individual who is not a resident of United States?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive a distribution from, or were you the grantor of, or transferor to, a foreign trust or did you have an interest in any foreign assets or accounts?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have an interest in or signature or other authority over a financial account in a foreign country, such as a bank account, securities account, or other financial account?   |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have an ownership interest in a business entity that is located outside the United States?   |
| <input type="checkbox"/> | <input type="checkbox"/> | Were you notified or audited by either the Internal Revenue Service or the State taxing agency?  |
| <input type="checkbox"/> | <input type="checkbox"/> | If you have an overpayment of 2022 taxes, do you want the excess applied to your 2023 estimated tax (instead of being refunded)?   |
| <input type="checkbox"/> | <input type="checkbox"/> | If you have a refund, do you want your refund to be directly deposited to your bank account, instead of receiving a check? If yes, please provide the bank account information where you would like the refund to be directly deposited. |
| <input type="checkbox"/> | <input type="checkbox"/> | If you have a balance due with your tax returns, do you want to pay the balance due electronically from your bank account? If yes, please provide the bank account information from where you would like the taxes to be paid from.      |
| <input type="checkbox"/> | <input type="checkbox"/> | Do you expect your 2023 taxable income and withholdings to be different from 2022?   |
| <input type="checkbox"/> | <input type="checkbox"/> | Do you want to allocate \$3 to the Presidential Election Campaign Fund?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Does your spouse want to allocate \$3 to the Presidential Election Campaign Fund?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive an Identity Protection PIN from the IRS? If yes, please provide us a copy of the notice showing the PIN.   |
| <input type="checkbox"/> | <input type="checkbox"/> | May the IRS discuss your tax return with your preparer?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive payments under a long-term care (LTC) insurance contract or received any accelerated death benefits from a life insurance policy?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Are you a member of the Armed Forces of the United States on active duty who moved pursuant to a military order related to a permanent change change of station?   |

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Tax Organizer

Please enter all pertinent 2022 information. If you have attached a government form for an item, check the box and do not enter a 2022 amount.

**WAGES, SALARIES AND TIPS**

Employer name:

<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____

2022 Amount	2021 Amount
Attach Forms W-2	_____
	_____
	_____
	_____

**INTEREST INCOME**

Payer name:

<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____

Attach Forms 1099-INT	_____
	_____
	_____
	_____

**DIVIDEND INCOME**

Payer name:

<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____

Attach Forms 1099-DIV	_____
	_____
	_____
	_____

**PENSIONS, IRA AND GAMBLING INCOME**

Payer name:

<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____

Attach Forms 1099-R & W-2G	_____
	_____
	_____
	_____
Winnings not reported on W-2G.....	_____
Total gambling losses.....	_____

**OTHER GOVERNMENT FORMS - INCOME**

<input type="checkbox"/>	Form 1099-B - Sales of stock (also include transaction history) .....
<input type="checkbox"/>	Form 1099-MISC - Miscellaneous income .....
<input type="checkbox"/>	Form 1099-K - Merchant card and third party network payments .....
<input type="checkbox"/>	Form 1099-S - Sales of real estate (also include closing statements) .

Attach Forms 1099	
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<input type="checkbox"/>	Form 1099-G - State tax refunds.....	
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Attach Forms 1099	
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Taxpayer:

<input type="checkbox"/>	Form SSA-1099 - Social security benefits .....
<input type="checkbox"/>	Form 1099-G - Unemployment compensation .....
<input type="checkbox"/>	Form 1099-Q (529 Plan) .....
<input type="checkbox"/>	Form 1099-QA/5498-QA (ABLE Accounts) .....

Attach Forms 1099	
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Spouse:

<input type="checkbox"/>	Form SSA-1099 - Social security benefits .....
<input type="checkbox"/>	Form 1099-G - Unemployment compensation .....
<input type="checkbox"/>	Form 1099-Q (529 Plan) .....
<input type="checkbox"/>	Form 1099-QA/5498-QA (ABLE Accounts) .....

Attach Forms 1099	
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**MISCELLANEOUS INCOME**

Taxpayer: Alimony received .....  
 Spouse: Alimony received .....

Other: \_\_\_\_\_


**RETIREMENT PLAN CONTRIBUTIONS**

Taxpayer: Traditional IRA contributions (1=maximum) .....  
 Roth IRA contributions (1=maximum) .....  
 Self-employed, SEP, SIMPLE, & qualified plan contributions (1=maximum) .....  
 Spouse: Traditional IRA contributions (1=maximum) .....  
 Roth IRA contributions (1=maximum) .....  
 Self-employed, SEP, SIMPLE, & qualified plan contributions (1=maximum) .....

	2022 Amount	2021 Amount

**OTHER GOVERNMENT FORMS - DEDUCTIONS**

Form 1098-E - Student loan interest .....  
 Form 1098-T - Tuition and related expenses .....

Attach Forms 1098	

**AFFORDABLE CARE ACT**

Form 1095-A - Health Insurance Marketplace Statement .....  
 Form 1095- B - Health Coverage .....  
 Form 1095-C - Employer-Provided Health Insurance Offer and Coverage .....

Attach Forms 1095	

**ADJUSTMENTS TO INCOME**

Taxpayer:  
 Self-employed health insurance premiums .....  
 Educator expenses .....  
 Other adjustments to income:  
 \_\_\_\_\_  
 \_\_\_\_\_  
 Alimony paid - Recipient name & SSN .....  
 \_\_\_\_\_  
 \_\_\_\_\_


Spouse:  
 Self-employed health insurance premiums .....  
 Educator expenses .....  
 Other adjustments to income:  
 \_\_\_\_\_  
 \_\_\_\_\_  
 Alimony paid - Recipient name & SSN .....  
 \_\_\_\_\_  
 \_\_\_\_\_


**MEDICAL AND DENTAL EXPENSES**

Prescription medicines and drugs .....  
 Doctors, dentists and nurses .....  
 Hospitals and nursing homes .....  
 Insurance premiums .....  
 Long-term care premiums - taxpayer .....  
 Long-term care premiums - spouse .....  
 Insurance reimbursement .....  
 Out-of-pocket lodging and transportation expenses .....  
 Number of medical miles .....  
 Other: \_\_\_\_\_  
 \_\_\_\_\_


**TAXES PAID**

State income taxes - 1/22 payment on 2021 state estimate .....

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