LOTITO & LAZZARA
Certified Public Accountants

CPANerds.com
ENGAGING CPAs WHO LOVE WHAT THEY DO.
(586) 468.0200

This 2022 Form 1040 Checklist Belongs To:

____

Please Print Your Name(s)

PLEASE CHOOSE DELIVERY METHOD OF TAX RETURN (SELECT ONE)

SECURE GATEWAY e-Delivery

○

PAPER COPY MAILED TO YOU

○

Married filers: Please provide both emails for e-Signing of Form 8879 e-file Authorization.

		Preferred Contact Method
Taxpayer Email:	______________________	○
Spouse Email:	______________________	○
Primary Phone:	______________________	○

Your documents will be mailed back to you at completion of your return. If you would like to pick them up, please reach out to us to set up a time to stop by.

Need help with your 2022 Checklist? Reach out to your CPANerds!

USPS continues to run slowly. Please allow plenty of time should you choose to provide your documents to us by mail. Also, be sure to keep copies of any original tax documents for your records before mailing your tax packet to us.

If you choose to upload your tax documents to our secure Gateway, please scan your documents as one file. It is not necessary to scan each document separately. Upload should be done when you are reasonably certain that all documents have been received.

How do I?

UPLOAD DOCS SECURELY THROUGH YOUR GATEWAY: www.cpanerds.com

MAIL IN/DROP OFF DOCS: **22525 Hall Road, Suite A, Macomb, MI 48042**

EMAIL QUESTIONS: 1040@cpanerds.com

GIVE US A RING: **(586) 468-0200**

FAX YOUR DOCS: **(586) 468-0747**

Tax Year 2022 Form 1040 Checklist

PLEASE PROVIDE THE FOLLOWING INFORMATION (if applicable to you!):

- ☐ Copy of your 2021 tax return. (For 1st year clients only.)
- ☐ Form W-2 - Wages earned as an employee
- ☐ Form 1099-INT - Interest earned. (Banks send if interest earned is more than $10)
- ☐ Form 1099-DIV - Dividends earned
- ☐ Form 1099-R - IRA, Pension, or annuitiy distributions
- ☐ Form SSA-1099 - Social Security benefits received
- ☐ Form 1099-CONS - Brokerage statement showing transactions for stocks, bonds, crypto transactions etc.
- ☐ Form 1099-NEC - Nonemployee compensation (Contractor, Entrepreneurs, Self Employed)
- ☐ Form 1099-MISC - Miscellanoues income (Rent, Royalties, Other)
- ☐ Schedule K-1 - Share of income or loss from partnerships, S Corporations, estates or trusts.
- ☐ Form 1099-G - Unemployment income or other state related payments (State refunds)
- ☐ Form W-2G - Gambling Winnings (Casino, Lottery, Raffle, etc)
- ☐ Form 1099-Q - Distributions from Qualified Education Programs (529 Plans)
- ☐ Form 1099-QA - Distributions from ABLE Account (Achieve a Better Life)
- ☐ Form 1099-SA - Distributions from a HSA Plan for medical. (Health Savings Account)
- ☐ Form 5498-QA - Contributions to an ABLE Account. (Achieving a Better Life)
- ☐ Form 5498-SA - Contributions to a HSA Plan for medical. (Health Savings Account)
- ☐ Form 1098 - Home mortgage interest paid (and points)
- ☐ Form 1098-T - Education expenses paid to a college/university (Tuition)
- ☐ Form 1098-E - Student loan interest paid
- ☐ Form 1095-A - Health Insurance through Marketplace
- ☐ Any tax notices sent to you by IRS or other taxing authority
- ☐ Tax Notice "CP01A" from IRS assigning you a six-digit Identity Protection PIN
- Copies of closing statements regarding the sale/purchase of real estate (property)

THOSE WHO HAVE PAID ESTIMATED TAXES FOR TAX YEAR 2022

Please provide date(s) and amount(s) paid below.

	Federal			State	
	Date Paid	Amount Paid		Date Paid	Amount Paid
Q1			Q1		
Q2			Q2		
Q3			Q3		
Q4			Q4		

We don't need copies of the checks. It is a good idea for you to keep them in your files though!

LOOKING TO POTENTIALLY ITEMIZE DEDUCTIONS

Please provide the amount for the following **(We do not need receipts, but you should keep them though!)**:

	Amounts Paid in 2022
Real Estate Taxes	
License Plate Tab Registration Fee	
Medical Out-of Pocket Expenses, including premiums	
Miles Driven for Medical Care	
Cash Charity Contributions	
Non-Cash Charity Contributions	
Place of Donation	
Miles Driven for Charitable Reasons	
Gambling Losses	

OTHER CREDITS/DEDUCTIONS

			YES	**NO**
1.	Amount of Long-Term Care Premiums Paid for yourself or family Premiums paid:		○	○
2.	Did you purchase a qualified plug-in electric drive vehicle, fuel cell vehicle, energy efficient home improvements this year? If yes, please provide details.		○	○
3.	Did you pay expenses related to the adoption of a child in 2022? Amount paid:		○	○
4.	Did you make any contributions in 2022 to a MESP or MET? (529 Plan) Amount paid:		○	○
5.	Any Childcare Payments to a Person or Organization How much did you pay in 2022? Number of children? *Provider Name* *Address* *Child care provider SSN or EIN*		○	○

OTHER CREDITS/DEDUCTIONS (CONTINUED)

			YES	NO
6.	Have you contributed, or do you plan on contributing to a retirement account?		○	○

	Amount	Indicate Type:	
Taxpayer	______	☐ Regular IRA	☐ Keogh
Spouse	______	☐ Roth IRA	☐ Simple
Date of contribution	______	☐ SEP IRA	

		YES	NO
7.	If you are subject to the IRA deduction limitations based on adjusted gross income, do you want to contribute the maximum allowed as a deduction?	○	○
8.	If **yes**, are you planning to make any nondeductible IRA contributions? Amount of contributions: ______	○	○
9.	Did you repay any COVID-19 related IRA distributions in 2022 originally taken in 2020? Amount Repaid: ______	○	○

BANK INFORMATION FOR DIRECT DEPOSIT REFUNDS

10. We are required to confirm this each year, so bear with us! If your banking info is unchanged from prior year, check here

Please provide banking info, if you'd like your refund to be directly deposited there.

Checking or Savings? -Select-

Bank Name: ______

Routing # ______

Account # ______

Refrain from emailing us your bank information!
Upload to our secure gateway

NEW CLIENT INFORMATION

New clients only - please provide the following information:

Name: ______

Date of birth: ______ SSN: ______

Name of Spouse: ______

Date of birth: ______ SSN: ______

Dependent: ______

Date of birth: ______ SSN: ______

Dependent: ______

Date of birth: ______ SSN: ______

Dependent: ______

Date of birth: ______ SSN: ______

Dependent: ______

Date of birth: ______ SSN: ______

LET'S GET PERSONAL

11. Please provide your current address that should appear on your 2022 Tax Return
    Address __________
    City __________
    State __________
    Zip Code __________

YES NO

12. Did your marital status change during 2022? ○ ○
    Spouse Name __________
    Spouse Date of Birth __________
    Spouse SSN __________

13. Did you pay (or receive) alimony during the tax year? ○ ○
    Paid To/Received From: __________ SSN: __________
    Amount: __________ Divorce Date: __________

14. Was a prior divorce agreement modified after 2018? ○ ○
    If so, please provide details if there was a change to the reporting of alimony

15. If you are separated or divorced with children, do you have a separation agreement or divorce decree that establishes custodial responsibilities? ○ ○
    If ***yes*** *, please provide a brief description of the agreement or decree (relative to which parent claims each child):*

____
____
____

CALLING ALL ENTREPRENEURS

16. Provide a Summary of Revenue and Expenses. (Quickbooks Profit & Loss or Similar)

17. Business Travel (Self-Employed Only)
    Business miles: __________
    Total miles: __________

18. Self Employed Health Insurance Premiums Paid in 2022

Amount Paid

For your employees: __________
For yourself and family: __________

YES NO

19. Did you use an area of your home for business purposes? ○ ○
    Square footage of the space used: __________
    Total square footage of home: __________

CALLING ALL LANDLORDS

	YES	NO
20. Do you have a rental property? *Provide a Summary of Rental Income and Expenses (By Property)*	○	○
21. Did you buy or sell a rental property this year? *If **yes** , please provide a copy of the closing statement.*	○	○

GENERAL QUESTIONS

	YES	NO
22. Did you reside in or operate a business in a Federally declared disaster area? The Federally declared disaster areas include flooding, hurricane/tropical wind storms, and wildfires in many states.	○	○
23. At any time during 2022, did you receive, sell, exchange or otherwise acquire any financial interest in any virtual currency?	○	○
24. Did you make gifts over $16,000 to an individual or trust or contribute to a prepaid tuition plan? If yes, please provide details.	○	○
25. Would you like to designate $3 to the Presidential Election Campaign Fund? Checking "Yes" will not change your tax or reduce your refund.	○	○
26. Did you make any out-of-state purchases (by telephone, internet, mail, or in person) on which the seller did not collect sales or use tax? What was the total amount of the purchases? ____________________	○	○
27. For those with wages earned in a city that has an income tax, were all of your wages worked within the city? *If all of your wages were not worked within the city, please provide a work log of your hours or days worked in the city and a letter from your employer that states all of your work is not performed within the city.*	○	○
28. Did you receive any income not included in the checklist?	○	○

DON'T BE SCAMMED! CALL US

The IRS does not send out unsolicited emails, texts, or phone calls requesting detailed personal information. Nor does the IRS use any form of social media to contact and/or gather information from

Such authentic-looking emails are called "phishing" emails and responding may expose you to identity theft. If you receive such an email from the IRS, send a copy of the email to phishing@irs.gov. Please do not respond to the email unless the email request you send to the IRS has been verified as legitimate. You may also contact our office regarding any correspondence, written or electronic, that you receive from the

HAVE SOMETHING YOU'D LIKE TO SHARE FOR 2022?

ANY CHANGES FOR 2023 WE SHOULD KNOW ABOUT?