



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 annuity 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 - Miscellaneous 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?

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?

