

**TURNER'S TAX SERVICE**  
 PO Box 349  
 Placerville, CA 95667

**2022 TAX ORGANIZER**  
 530-626-8551  
 turnerstaxservice56@gmail.com

**SECTION 1 – General Information**

<i><b>Taxpayer</b></i>	<i><b>Spouse</b></i>
Name _____	Name _____
Birthdate _____ Age _____	Birthdate _____ Age _____
SSN _____	SSN _____
Occupation _____	Occupation _____
Home Phone _____	Home Phone _____
Cell Phone _____	Cell Phone _____
E-Mail Address _____	E-Mail Address _____
Present Address _____	
Address on last year's tax return (if changed) _____	

**Dependents**

Name	SSN	DOB	# Months in home

Check if you are a noncustodial parent claiming an exemption for a child not living with you but for which the custodial parent has released the exemption to you. Please provide a copy of the Form 8332 signed by the custodial parent.

Check if any of your dependent children have unearned income (interest, dividends, capital gains, etc.) or wages.

Check if any of your dependent children will be filing his or her own tax return this year.

**Direct Deposit Information**

Name of financial Institution \_\_\_\_\_

Routing Number \_\_\_\_\_

Account Number \_\_\_\_\_

Type of Account                      Checking                      Savings

Ownership of Account              Self              Spouse              Both

*Verification of the routing and account numbers is required. Please bring checkbook to appointment or send voided check.*

## SECTION 2 – INFORMATION THAT MAY AFFECT YOUR TAX SITUATION

YES NO

Were you a resident of the same state for the entire year?

Have you received any correspondence from the IRS or a state tax agency?

Any births, adoptions, marriages, divorces or deaths in your immediate family in 2022?

Did you contribute to an IRA, Roth IRA or self-employed retirement plan?

Did you inherit any assets (stocks, bond, IRA, real property)?

Did you sell, purchase or refinance a personal residence during 2022?

Did you, your spouse or any dependent take any college or job skill courses?

Did you pay any interest on student loans?

Did you receive a Middle Class Refund from CA in 2022? If yes, how much? \_\_\_\_\_

Did you buy or sell any stocks, bonds, or investment property?

Are you making payments on an RV or boat that has basic living accommodations?

Did you make gifts of more than \$16,000 to any one person or organization?

Do you rent out property through an online exchange such as Airbnb or VRBO?

Did you purchase, receive, sell or dispose of a digital asset such as crypto currency?

Do you have a foreign bank account, foreign brokerage account or own property in a foreign country?

Did you pay wages of \$2400 or more to a household employee (nanny, maid, health care worker)?

Did you pay child or dependent care expenses? If yes, please provide the amounts paid and the name, address, telephone number and Social Security number or tax ID number of the provider.

Did you purchase any items out-of-state, have them shipped to California and didn't pay sales tax?

Did you pay or receive alimony in 2022? If yes, please list the name and Social Security number of recipient of alimony.

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Did you use your car for medical or charitable travel?

If yes, please list January -- June \_\_\_\_\_ and July -- December \_\_\_\_\_

May the IRS discuss your return with me?

If you receive a refund, do you want to have it deposited directly into your bank account?

If so, please complete the Direct Deposit Information section on page 1.

Do you want my fee to be deducted from your refund? There is a \$50 fee for that service.

Do you want to pay my fee by credit card?

**We will email your draft return to you.**

**Check here if you want it mailed instead. There will be a \$15 fee to mail the draft.**

## SECTION 3 – HEALTH INSURANCE

### HEALTH INSURANCE

Did you and all of the dependents have health insurance for all 12 months of 2022?

**Yes** \_\_\_\_\_      **No** \_\_\_\_\_      **Some** \_\_\_\_\_

If you answered "Yes", please provide proof of health insurance.

- If insured by a health exchange such as Covered California or HealthCare.gov, send the 1095A and, for California residents, CA3895.
- If insured by a governmental agency, a private insurance company or your employer, send the 1095B or 1095C, if you have received it. If you have not received a 1095B or 1095C, then please provide alternative proof of health insurance.

If you answered "No" or "Some," please list those who did not have insurance and the months they were uninsured.

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## SECTION 4 – THINGS TO BRING (OR SEND) TO YOUR TAX PREPARER

**PLEASE be as organized as possible. If you bring a shoebox or brown paper bag of material that you haven't sorted through, it will take extra time to prepare your return and that will increase the fee you are charged.**

Completed tax organizer  
All copies of wage statements (W-2's)  
Interest and dividend income information (1099-INT, 1099-DIV, brokerage statements)  
Partnership, Estate, and/or Trust income (K-1's)  
State refund amount (1099-G)  
Alimony paid or received  
Self-employed business income and expenses (Provide a P and L or complete additional form)  
Sale of property information (stocks, bonds, real estate). For stock sales, please provide the date of purchase and the purchase price. For real estate sales, please provide the final settlement statement from the original purchase as well as the sale.  
Retirement and Social Security benefits (1099R)  
IRA distributions (1099R)  
Rental property income and expenses (Provide a P and L or complete additional form)  
Unemployment compensation (1099G)  
Lottery or gambling winnings (W2G)  
Other income such as tips, prizes, bonuses, jury duty, gambling winnings (W2G)  
IRA contributions  
Interest paid on student loans  
Tuition and fees expenses (1098T) as well as receipts for books and course materials  
Contributions to a Health Savings Account or payments from a Health Savings Account  
Child care expenses (name, address, phone, SS or tax ID and amount paid)  
Records of estimated taxes paid (dates paid and amount of each payment)  
1095A from Covered California or Healthcare.gov. California residents should also bring CA3895.

If you itemize deductions, please also provide this information:

Medical expenses (if greater than 7.5% of gross). Please separate into the following categories – prescriptions, fees for doctors and dentists, fees for hospitals, lab and x-ray fees, medical aids such as glasses, medical equipment and supplies, medical mileage (including parking), lodging related to medical care and health insurance premiums – and provide totals  
Sales tax paid on big ticket items (cars, boats, RV, etc)  
DMV registration (only the vehicle license portion is deductible)  
Home mortgage and home equity loan interest for primary and second home  
Property taxes  
Final settlement statement for the purchase, sale or refinance of a home  
Charitable contributions in cash  
Charitable contributions in kind – name and address of charity, date of donation, list of donated items, purchase price of donated items, current value of donated items  
Work-related expenses not reimbursed by your employer (state return only)  
Safe deposit box rental  
Copy of final paystub for 2022

**Thank you for choosing Turner's Tax Service to prepare your 2022 tax return**