

GREGORY L BUHROW, CPA, PC

Tax Year: 2022

Very Important > Answer each applicable item

Client Name: _____ **Spouse Name:** _____

Married Filing Jointly Single Head of Household Married Filing Separately

Required:

Email > Client _____ Spouse: _____

Cell phone > Client _____ Spouse: _____

Driver license > Client copy included Spouse copy included (State, Number, Issue and Expiration date)

Tax return copies sent > 2021 2020 (*One year mandatory*) IRS Identity-theft PIN > Letter(s)

Okay for IRS to discuss processing of return with preparer (*lasts for one year, until 4/15/2024*)

Mail to client (Postage applies) **Email via secure portal**

Estimated tax PAID > Payment records attached

E-Filing: PIN signature: First 5 digits of SSN OK? If **No**, then: Taxpayer _____ Spouse _____

Bank account: Checking Savings Copy of voided check Use same account for Fed/state

Routing number: _____ **Account number:** _____

Refund: Direct deposit Check Apply **Due:** Direct debit IRS Pay Check EFTPS

Other income? No Yes \$ _____ (*documentation*) _____

Cryptocurrency? No Yes **Foreign bank acct?** No Yes _____

Child with: Earned; Unearned income Amount \$ _____

Unemployment compensation \$ _____ State: _____ (include Form 1099-G)

Standard Deduction MFJ - \$25,900; Single - \$12,950; HOH - \$19,400; > 65 +\$1,400

Itemized Deductions Form 1098 Property tax (paid in 2022) Charitable contributions

Sales tax State Income Tax Casualty in declared disaster area

Medical expenses Summary documentation included

Credits/Other

Home office: Regular and exclusive use Sq footage _____ Total home sq ft _____

EITC/CTC/ODC Any tax credits besides what is listed above?

College: AOTC/LLC Form 1098-T plus List of all college expenses \$ _____

For **Traders in Securities** > Trading expenses

For **Mark-to-Market Traders** > MTM Election included Making MTM Election for 2023

Additional information: _____

