

2022	1040	US	Tax Organizer
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**GRADY CPA PC**  
**47 W MARKET ST STE 3**  
**RHINEBECK NY 12572**

Telephone number: 845-876-4911  
 Fax number: 845-876-6002  
 E-mail address: jgrady@gradycpas.com

### 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....		

**2022 1040 US 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"/>	
<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"/>	
<input type="checkbox"/>	

**Attach Forms 1099-INT**

**DIVIDEND INCOME**

Payer name:

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

**Attach Forms  
1099-R & W-2G**

Winnings not reported on W-2G .....  
Total gambling losses .....

**OTHER GOVERNMENT FORMS - INCOME**

- ☐ Form 1099-B - Sales of stock (also include transaction history) .....
- ☐ Form 1099-MISC - Miscellaneous income .....
- ☐ Form 1099-K - Merchant card and third party network payments .....
- ☐ Form 1099-S - Sales of real estate (also include closing statements) .

**Attach Forms 1099**

- ☐ Form 1099-G - State tax refunds .....

**Attach Forms 1099**

Taxpayer:

- ☐ Form SSA-1099 - Social security benefits .....
- ☐ Form 1099-G - Unemployment compensation .....
- ☐ Form 1099-Q (529 Plan) .....
- ☐ Form 1099-QA/5498-QA (ABLE Accounts) .....

**Attach Forms 1099**

Spouse:

- ☐ Form SSA-1099 - Social security benefits .....
- ☐ Form 1099-G - Unemployment compensation .....
- ☐ Form 1099-Q (529 Plan) .....
- ☐ Form 1099-QA/5498-QA (ABLE Accounts) .....

**Attach Forms 1099**

<b>2022</b>	<b>1040</b>	<b>US</b>	<b>Tax Organizer</b>
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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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<b>2022</b>	<b>1040</b>	<b>US</b>	<b>Tax Organizer</b>
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**TAXES PAID (continued)**

State income taxes - paid with 2021 state extension .....

State income taxes - paid with 2021 state return .....

State income taxes - paid for prior years and/or to other states .....

City/local income taxes - 1/22 payment on 2021 city/local estimate .....

City/local income taxes - paid with 2021 city/local extension .....

City/local income taxes - paid with 2021 city/local return .....

State and local sales taxes (except autos and special items) .....

Use taxes paid on 2022 purchases .....

Use taxes paid on 2021 state return .....

Sales tax on autos not included above .....

Sales taxes paid on boats, aircraft, and other special items .....

Real estate taxes - principal residence .....

Real estate taxes - property held for investment .....

Foreign income taxes .....

☐ Personal property taxes (including automobile fees in some states) ....

2022 Amount

2021 Amount

Attach Tax Notice

**INTEREST PAID**

Home mortgage interest and points paid:

☐  
☐

Home mortgage interest not on Form 1098 (include name, SSN, &amp; address of payee):

Points not reported on Form 1098:

Mortgage insurance premiums on post 12/31/06 contracts .....

Investment interest (interest on margin accounts):

Passive interest .....

**CASH CONTRIBUTIONS**

NOTE: No deduction is allowed for cash or check contributions unless the donor maintains a bank record, or a written communication from the donee, showing the name of the organization, contribution date(s), and contribution amount(s).

Volunteer expenses (out-of-pocket) .....

Number of charitable miles .....

**NONCASH CONTRIBUTIONS**

NOTE: No deduction is allowed for contributions of clothing and household items that are not in good used condition or better, in addition, a deduction for any item with minimal monetary value may be denied.

**MISCELLANEOUS DEDUCTIONS**

Union and professional dues .....

Tax return preparation fee .....

Safe deposit box rental .....

Investment expenses .....

Estate tax, section 691(c) .....

Unreimbursed employee expenses:

Other:

<b>2022</b>	<b>1040</b>	<b>US</b>	<b>Client Information</b>	<b>1</b>
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**Tax Return Appointment**

**Date:**  
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**This tax organizer will assist you in gathering information necessary for the preparation of your 2022 tax return. Please add, change, or delete information as appropriate.**

**CLIENT INFORMATION**

Filing Status	Filing status (table) ..... 1=married filing separate and lived with spouse ..... Year spouse died, if qualifying surviving spouse (2020 or 2021) ...	
Taxpayer	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 .....	<p><b>Filing Status</b></p> <p>1 = Single          2 = Married filing joint          3 = Married filing separate          4 = Head of household          5 = Qualifying surviving spouse (QSS)</p>
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 .....	
Address	In care of ..... Street address ..... Apartment number ..... City ..... State ..... ZIP code .....	
Foreign Address	Region ..... Postal code ..... Country .....	

<b>2022</b>	<b>1040</b>	<b>US</b>	<b>Client Information (continued)</b>	<b>1</b> p2
Please add, change or delete information for 2022.				
<b>CLIENT INFORMATION</b>				
Taxpayer Contact Information	Home phone. ....		<b>Daytime Phone</b>  1 = Work 2 = Home 3 = Mobile	
	Work phone. ....			
	Work extension. ....			
	Daytime phone (table) ....			
	Mobile phone. ....			
	Fax number. ....			
	E-mail address. ....			
Spouse Contact Information	Home phone. ....			
	Work phone. ....			
	Work extension. ....			
	Daytime phone (table) ....			
	Mobile phone. ....			
	Fax number. ....			
Taxpayer Authentication	Driver's license no. ....			
	Driver's license state. ....			
	Issue date (m/d/y) ....			
	Expiration date (m/d/y) ....			
	Theft protection PIN. ....			
Spouse Authentication	Driver's license no. ....			
	Driver's license state. ....			
	Issue date (m/d/y) ....			
	Expiration date (m/d/y) ....			
	Theft protection PIN. ....			
				<b>1</b> p2

<b>2022</b>	<b>1040</b>	<b>US</b>	<b>Dependents</b>	<b>2</b>																																										
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<b>2022</b>	<b>1040</b>	<b>US</b>	<b>Miscellaneous Questions</b>
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**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****PERSONAL INFORMATION**☐☐

Did your marital status change during the year?

☐☐

Did your address change during the year?

☐☐

Could you be claimed as a dependent on another person's tax return for 2022?

**DEPENDENTS**☐☐

Were there any changes in dependents?

☐☐

Were any of your unmarried children who might be claimed as dependents 19 years of age or older (or 24 years or older if student) at the end of 2022?

☐☐

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 \$1,100, or total investment income in excess of \$2,200?

**HEALTH CARE COVERAGE**☐☐

Did you receive IRS document Form 1095-A (Health Insurance Marketplace Statement), If so, please attach.

**INCOME**☐☐

Did you receive unreported tip income of \$20 or more in any month?

☐☐

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?

☐☐

Did you receive any disability income?

☐☐

Did you have any foreign income or pay any foreign taxes?

**PURCHASES, SALES AND DEBT**☐☐

Did you start a business or farm, purchase rental or royalty property, or acquire an interest in a partnership, S corporation, trust, or REMIC?

☐☐

Did you purchase or dispose of any business assets (furniture, equipment, vehicles, real estate, etc.), or convert any personal assets to business use?

☐☐

Did you buy or sell any stocks, bonds or other investment property in 2022?

☐☐

Did you purchase, sell, or refinance your principal home or second home, or did you take a home equity loan?

☐☐

Did you make any residential energy-efficient improvements or purchases involving solar, wind, geothermal or fuel cell energy sources?

☐☐

Did you have any debts cancelled or forgiven?

☐☐

Does anyone owe you money which has become uncollectible?



**2022****1040****US****Miscellaneous Questions (continued)**

**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****RETIREMENT PLANS**☐☐

Did you receive a distribution from a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.)?

☐☐

Did you make a contribution to a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.)?

☐☐

Did you transfer or rollover any amount from one retirement plan to another retirement plan?

**EDUCATION**☐☐

Did you receive a distribution from an Education Savings Account or a Qualified Tuition Program?

☐☐

Did you, your spouse, or a dependent incur any tuition expenses that are required to attend a college, university, or vocational school?

**ITEMIZED DEDUCTIONS**☐☐

Did you incur a loss because of damaged or stolen property?

☐☐

Did you work out of town for part of the year?

☐☐

Did you use your car on the job (other than to and from work)?

**ESTIMATED TAXES**☐☐

Did you apply an overpayment of 2021 taxes to your 2022 estimated tax (instead of being refunded)?

☐☐

If you have an overpayment of 2022 taxes, do you want the excess applied to your 2023 estimated tax (instead of being refunded)?

☐☐

Do you expect your 2023 taxable income and withholdings to be different from 2022?

**MISCELLANEOUS**☐☐

Do you want to allocate \$3 to the Presidential Election Campaign Fund?

☐☐

Does your spouse want to allocate \$3 to the Presidential Election Campaign Fund?

☐☐

May the IRS discuss your tax return with your preparer?

☐☐

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?

**2022****1040****US****Miscellaneous Questions (continued)**

**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****MISCELLANEOUS (continued)**☐☐

Did you receive a distribution from, or were you the grantor of, or transferor to, a foreign trust?

☐☐

Was your home rented out or used for business?

☐☐

Did you have a medical savings account (MSA), a Medicare Advantage MSA, or acquire an interest in an MSA or a Medicare Advantage MSA because of the death of the account holder? Or, were you a policyholder who received payments under a long-term care (LTC) insurance contract or received any accelerated death benefits from a life insurance policy?

☐☐

Did you receive a distribution from an Achieving a Better Life Experience (ABLE) savings account?

☐☐

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 of station?

☐☐

Did you engage the services of any household employees?

☐☐

Were you notified or audited by either the Internal Revenue Service or the State taxing agency?

☐☐

Did you or your spouse make any gifts to an individual that total more than \$15,000, or any gifts to a trust?

☐☐

Did your bank account information change within the last twelve months?

☐☐

At any time during 2022, did you receive, sell, send, exchange, or otherwise acquire any financial interest in any virtual currency?

**2022****1040****US****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**☐☐

Did your marital status change during the year?

☐☐

Did your address change during the year?

☐☐

Could you be claimed as a dependent on another person's tax return?

☐☐

Were there any changes in dependents?

☐☐

Did you and your dependents have health care coverage for the full-year?

☐☐

Did you receive an IRS document 1095-A (Health Insurance Marketplace Statement)? If so, please attach.

☐☐

Did you receive unreported tip income of \$20 or more in any month?

☐☐

Did you receive any disability income?

☐☐

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

☐☐

Did you purchase, sell, or refinance your principal home or second home, or did you take a home equity loan?

☐☐

Did you make any residential energy-efficient improvements or purchases involving solar, wind, geothermal or fuel cell energy sources?

☐☐

Did you receive a distribution from or make a contribution to a retirement plan (401(k), IRA, etc.)?

☐☐

Did you transfer or rollover any amount from one retirement plan to another?

☐☐

Did you convert part or all of your traditional/SEP/SIMPLE IRA to a Roth IRA?

☐☐

Did you, your spouse, or a dependent incur any tuition expenses that are required to attend a college, university, or vocational school?

☐☐

Did you incur a loss because of damaged or stolen property?

☐☐

Did you use your car on the job (other than to and from work)?

☐☐

May the IRS discuss your tax return with your preparer?

☐☐

Was your home rented out or used for business?

☐☐

Were you notified or audited by either the IRS or the State taxing agency?

☐☐

Did you receive an economic impact payment? If so, how much?



2022	1040	US	Direct Deposit & Estimates (Form 1040 ES) (cont.)	7.1
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Please enter all pertinent 2022 information.

### APPLICATION OF 2022 OVERPAYMENT (7.1)

If you have an overpayment of 2022 taxes, do you want the excess refunded? ☐ or applied to 2023 estimate? ☐

Other (please explain): \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

### 2023 ESTIMATED TAX INFORMATION

Do you expect your 2023 taxable income to be different from 2022? ..... Yes ☐ No ☐

If "yes" explain any differences in income, deductions, dependents, etc.: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

Do you expect your 2023 withholding to be different from 2022? ..... Yes ☐ No ☐

If "yes" explain any differences: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

7.1

<b>2022</b>	<b>1040</b>	<b>US</b>	<b>Wages, Pensions, Gambling Winnings</b>	<b>10, 13.1, 13.2</b>
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Please enter all pertinent 2022 amounts & attach all W-2, W-2G and 1099-R forms.  
Last year's amounts are provided for your reference.

**WAGES, SALARIES, TIPS (10)**

No.	Name of Employer (Box c)	1=retirement plan (Box 13) 1=spouse	Wages, Tips, Other Compensation (Box 1)	Tax Withheld				2021 Wages
				Federal (Box 2)	Social Security (Box 4)	Medicare (Box 6)	State (Box 17)	

**PENSIONS, IRA DISTRIBUTIONS (13.1)**

No.	Name of Payer	Distribution code		Gross Distribution (Box 1)	Taxable Amount (Box 2a)	Tax Withheld		Value of all IRAs at 12/31/22	2021 Distribution
		#1 1=IRA/SEP/SIMPLE 1=spouse	#2			Federal (Box 4)	State (Box 14)		

**GAMBLING WINNINGS (W-2G) (13.2)**

No.	Name of Payer	1=spouse	Gross Winnings (Box 1)	Tax Withheld			2021 Winnings
				Federal (Box 4)	State (Box 15)	Local (Box 17)	

**GAMBLING LOSSES & WINNINGS (NON W-2G) (13.2)**

Total gambling losses .....  
Winnings not reported on Form W-2G .....

2022 Amount	TS	2021 Amount

**10, 13.1, 13.2**

11, 12

<b>2022</b>	<b>1040</b>	<b>US</b>	<b>Miscellaneous Income</b>
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	<b>14.1</b>
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**Please enter all pertinent 2022 amounts and attach all 1099-MISC, 1099-NEC, SSA-1099, and RRB-1099 forms. Last year's amounts are provided for your reference.**

### MISCELLANEOUS INCOME

	2022 Amount		2021 Amount	
	Taxpayer	Spouse	Taxpayer	Spouse
Social security benefits (SSA-1099, box 5) .....				
Medicare premiums paid (SSA-1099) .....				
1=treat Medicare premiums paid as SE health ins. ....				
Tier 1 RR retirement benefits (RRB-1099, box 5) ...				
1=lump-sum election for SS benefits .....				
Alimony received .....				
Taxable scholarships and fellowships .....				
Jury duty pay .....				
Household employee income not on W-2 .....				
Excess minister's allowance .....				
Alaska permanent fund dividends .....				
Income from rental of personal property .....				
Income subject to S/E tax:				
_____				
_____				
_____				
_____				
Other income (1099-MISC, box 3, 8, 1099-NEC, box 1)				
_____				
_____				
_____				
_____				
_____				

### TAX WITHHELD (not entered elsewhere)

Federal income tax withheld .....				
State income tax withheld .....				
Local income tax withheld .....				

	<b>14.1</b>
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2022

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US

State &amp; Local Tax Refunds / Unemployment Compensation

14.2

Please add, change or delete 2022 information as appropriate.  
Be sure to attach all 1099-G forms.

# STATE AND LOCAL TAX REFUNDS / UNEMPLOYMENT COMPENSATION (Form 1099-G)

2022 1099-G Amount

No. <input type="text"/>	Name of payer.....		
	1=spouse.....		
	Unemployment compensation:		
	Total received (Box 1).....		
	2022 Overpayment repaid .....		
	State and local refunds:		
	State and local income tax refund, credit or offsets (Box 2) .....		
	1=city or local income tax refund.....		
	Tax year for box 2 if not 2021 (Box 3) .....		
	Federal income tax withheld (Box 4).....		
	RTAA payments (Box 5).....		
	Taxable grants:		
	Federal taxable amount (Box 6).....		
	State taxable amount, if different.....		
	Farm amounts:		
Agriculture payments (Box 7).....			
1=agriculture payments are from conservation reserve program .....			
Market gain (Box 9).....			
Number of farm.....			
1=box 2 is trade or business income (Box 8) .....			
State income tax withheld (Box 11).....			

No. <input type="text"/>	Name of payer.....		
	1=spouse.....		
	Unemployment compensation:		
	Total received (Box 1).....		
	2022 Overpayment repaid .....		
	State and local refunds:		
	State and local income tax refund, credit or offsets (Box 2) .....		
	1=city or local income tax refund.....		
	Tax year for box 2 if not 2021 (Box 3) .....		
	Federal income tax withheld (Box 4).....		
	RTAA payments (Box 5).....		
	Taxable grants:		
	Federal taxable amount (Box 6).....		
	State taxable amount, if different.....		
	Farm amounts:		
Agriculture payments (Box 7).....			
1=agriculture payments are from conservation reserve program .....			
Market gain (Box 9).....			
Number of farm.....			
1=box 2 is trade or business income (Box 8) .....			
State income tax withheld (Box 11).....			

14.2

2022

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US

Education Distributions (ESA's and QTP's)

14.3

Please enter all pertinent 2022 amounts and attach all 1099-Q forms.  
Enter qualified education expenses below that are not entered elsewhere.  
Last year's amounts are provided for your reference.

## ESA'S AND QTP'S (Form 1099-Q)

		2022 Amount	2021 Amount
No. <input type="text"/>	Name of payer.....		
	1=spouse.....		
	Qualified expenses:		
	Higher education (net of nontaxable benefits) .....		
	Elementary & secondary education (net of nontaxable benefits) ..		
	Form 1099-Q:		
	Gross distributions (Box 1) .....		
	Earnings (Box 2) .....		
	Basis (Box 3) .....		
	Rollover: 1=nontaxable, 2=taxable (Box 4) .....		
	Distribution type: 1=private 529, 2=state 529, 3=Coverdell ESA (Box 5) ..		
	ESA's only:		
2022 contributions to this ESA .....			
Value of this account at 12/31/22 (plus outstanding rollovers)			
Basis in this ESA as of 12/31/21 .....			
No. <input type="text"/>	Name of payer.....		
	1=spouse.....		
	Qualified expenses:		
	Higher education (net of nontaxable benefits) .....		
	Elementary & secondary education (net of nontaxable benefits) ..		
	Form 1099-Q:		
	Gross distributions (Box 1) .....		
	Earnings (Box 2) .....		
	Basis (Box 3) .....		
	Rollover: 1=nontaxable, 2=taxable (Box 4) .....		
	Distribution type: 1=private 529, 2=state 529, 3=Coverdell ESA (Box 5) ..		
	ESA's only:		
2022 contributions to this ESA .....			
Value of this account at 12/31/22 (plus outstanding rollovers)			
Basis in this ESA as of 12/31/21 .....			
No. <input type="text"/>	Name of payer.....		
	1=spouse.....		
	Qualified expenses:		
	Higher education (net of nontaxable benefits) .....		
	Elementary & secondary education (net of nontaxable benefits) ..		
	Form 1099-Q:		
	Gross distributions (Box 1) .....		
	Earnings (Box 2) .....		
	Basis (Box 3) .....		
	Rollover: 1=nontaxable, 2=taxable (Box 4) .....		
	Distribution type: 1=private 529, 2=state 529, 3=Coverdell ESA (Box 5) ..		
	ESA's only:		
2022 contributions to this ESA .....			
Value of this account at 12/31/22 (plus outstanding rollovers)			
Basis in this ESA as of 12/31/21 .....			

14.3

**2022****1040****US****ABLE Distributions****14.4**

Please enter all pertinent 2022 amounts. Last year's amounts are provided for your reference.

**ABLE DISTRIBUTIONS / CONTRIBUTIONS****2022 Amount****2021 Amount**

No. <input type="text"/>	Name of payer or issuer .....		
	1=spouse .....		
	Distributions (1099-QA):		
	Gross distributions (1) .....		
	Earnings (2) .....		
	Basis (3) .....		
	1=program to program transfer (4) .....		
	1=ABLE account terminated (5) .....		
	1=recipient is not the designated beneficiary (6) .....		
	Qualified disability expenses paid .....		
	Amount excluded from 10% tax .....		
	Excess contributions:		
	Excess contributions withdrawn by due date of return .....		
Earnings on excess contributions .....			

No. <input type="text"/>	Name of payer or issuer .....		
	1=spouse .....		
	Distributions (1099-QA):		
	Gross distributions (1) .....		
	Earnings (2) .....		
	Basis (3) .....		
	1=program to program transfer (4) .....		
	1=ABLE account terminated (5) .....		
	1=recipient is not the designated beneficiary (6) .....		
	Qualified disability expenses paid .....		
	Amount excluded from 10% tax .....		
	Excess contributions:		
	Excess contributions withdrawn by due date of return .....		
Earnings on excess contributions .....			

No. <input type="text"/>	Name of payer or issuer .....		
	1=spouse .....		
	Distributions (1099-QA):		
	Gross distributions (1) .....		
	Earnings (2) .....		
	Basis (3) .....		
	1=program to program transfer (4) .....		
	1=ABLE account terminated (5) .....		
	1=recipient is not the designated beneficiary (6) .....		
	Qualified disability expenses paid .....		
	Amount excluded from 10% tax .....		
	Excess contributions:		
	Excess contributions withdrawn by due date of return .....		
Earnings on excess contributions .....			

**14.4**

2022	1040	US	Business Income (Schedule C)	No. <input type="text"/>	16
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Please enter all pertinent 2022 amounts. Last year's amounts are provided for your reference.

### GENERAL INFORMATION

Principal business/profession.....	
Principal business code.....	
Business name, if different from Form 1040.....	
Business address, if different from Form 1040.....	
City, if different from Form 1040.....	
State, if different from Form 1040.....	
ZIP code, if different from Form 1040.....	
Foreign region.....	
Foreign postal code.....	
Foreign country.....	
Employer identification number.....	
Other accounting method.....	

Accounting method: 1=cash, 2=accrual.....		
Inventory method: 1=cost, 2=lower cost/market, 3=other.....		
1=change of inventory method.....		
1=spouse, 2=joint.....		
1=first Schedule C filed for this business.....		
If required to file Form(s) 1099, did you or will you file all required Form(s) 1099: 1=yes, 2=no.....		
1=not subject to self-employment tax.....		
1=did not "materially participate".....		
1=personal services is not a material income producing factor.....		
1=investment.....		
1=minister's Schedule C.....		
1=single member limited liability company.....		
1=trader in financial instruments or commodities.....		

### INCOME

	2022 Amount	2021 Amount
Gross receipts or sales (Form 1099-MISC, box 7).....		
Returns and allowances.....		
Other income:		

### COST OF GOODS SOLD

Inventory at beginning of the year.....		
Purchases.....		
Cost of items for personal use.....		
Cost of labor.....		
Materials and supplies.....		
Other costs:		
Inventory at end of the year.....		

<b>2022</b>	<b>1040</b>	<b>US</b>	<b>Business Income (Schedule C) (cont.)</b>	No. <span style="border: 1px solid black; display: inline-block; width: 40px; height: 15px;"></span>	<b>16</b> p2
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Please enter all pertinent 2022 amounts. Last year's amounts are provided for your reference.

**EXPENSES**

	2022 Amount	2021 Amount
Accounting.....		
Advertising.....		
Answering service.....		
Bad debts from sales or service.....		
Bank charges.....		
Car and truck expenses (not entered elsewhere).....		
Commissions.....		
Contract labor.....		
Delivery and freight.....		
Dues and subscriptions.....		
Employee benefit programs.....		
Insurance (other than health).....		
Mortgage interest (paid to banks, etc.).....		
Other interest (not entered elsewhere).....		
Janitorial.....		
Laundry and cleaning.....		
Legal and professional.....		
Miscellaneous.....		
Office expense.....		
Outside services.....		
Parking and tolls.....		
Pension and profit sharing plans - contributions.....		
Pension and profit sharing plans - admin. and education costs.....		
Postage.....		
Printing.....		
Rent - vehicles, machinery, & equipment (not entered elsewhere).....		
Rent - other.....		
Repairs.....		
Security.....		
Supplies.....		
Taxes - real estate.....		
Taxes - payroll.....		
Taxes - sales tax included in gross receipts.....		
Taxes - other (not entered elsewhere).....		
Telephone.....		
Tools.....		
Travel.....		
Total meals in full (50%).....		
Department of Transportation meals in full (80%).....		
Meals provided by restaurants in full (100%).....		
Uniforms.....		
Utilities.....		
Wages.....		

Other expenses:


NOTE: If you purchased or disposed of any business assets, please complete Sheet 22.

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2022

1040

US

Installment Sales (Form 6252)

17 p2

Please enter all pertinent 2022 amounts. Last year's amounts are provided for your reference.

## PRIOR YEAR INSTALLMENT SALE

		2022 Amount	2021 Amount
No. <input type="text"/>	Description of property .....		
	Date acquired (m/d/y) .....		
	Date sold (m/d/y) .....		
	Gross profit ratio (.xxxx) .....		
	Current year principal payments (-1 if none) .....		
No. <input type="text"/>	Description of property .....		
	Date acquired (m/d/y) .....		
	Date sold (m/d/y) .....		
	Gross profit ratio (.xxxx) .....		
	Current year principal payments (-1 if none) .....		
No. <input type="text"/>	Description of property .....		
	Date acquired (m/d/y) .....		
	Date sold (m/d/y) .....		
	Gross profit ratio (.xxxx) .....		
	Current year principal payments (-1 if none) .....		
No. <input type="text"/>	Description of property .....		
	Date acquired (m/d/y) .....		
	Date sold (m/d/y) .....		
	Gross profit ratio (.xxxx) .....		
	Current year principal payments (-1 if none) .....		
No. <input type="text"/>	Description of property .....		
	Date acquired (m/d/y) .....		
	Date sold (m/d/y) .....		
	Gross profit ratio (.xxxx) .....		
	Current year principal payments (-1 if none) .....		
No. <input type="text"/>	Description of property .....		
	Date acquired (m/d/y) .....		
	Date sold (m/d/y) .....		
	Gross profit ratio (.xxxx) .....		
	Current year principal payments (-1 if none) .....		
No. <input type="text"/>	Description of property .....		
	Date acquired (m/d/y) .....		
	Date sold (m/d/y) .....		
	Gross profit ratio (.xxxx) .....		
	Current year principal payments (-1 if none) .....		

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2022

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US

Sale of Home &amp; Moving Expenses

17, 27

If you sold your home or moved in 2022, please complete the information below.  
For the sale of home, please provide Form 1099-S and closing statements from  
the purchase and sale of your home.

**SALE OF HOME (17)**

Description of property (Box 3) .....

Date acquired (m/d/y) .....

Date sold (m/d/y) (Box 1) .....

Sales price (Box 2) .....

1=sale of home .....

1=owned and used property as main home for at least 2 of 5 years before sale .....

1=first-time homebuyer credit was previously taken on this home .....

1=business use in year of sale .....

Number of days after December 31, 2008 that home was not used as principal residence .....


**Adjusted Basis**

Original cost .....

Improvements:


Adjusted basis .....

**Expenses of Sale** (Commissions, advertising fees, legal fees, and loan charges paid by the seller)

.....

.....

.....

Total expenses of sale .....


**Reduced Exclusion**

Please complete the following information if due to a change in health, place of employment, or unforeseen circumstances you either:  
a) Did not meet the ownership and use tests \*, or b) Excluded gain on the sale of another home after May 6, 1997.

If excl. gain from another home after May 6, 1997 & within 2 yrs. of current sale, enter date of sale (m/d/y) .....

1=sale due to change in health, employment or unforeseen circumstances .....

Days used as main home - taxpayer .....

Days used as main home - spouse .....

Days property owned - taxpayer .....

Days property owned - spouse .....


**MOVING EXPENSES (27)** (If you are a member of the Armed Forces and moved due to a permanent change in station)

1=spouse, 2=joint .....

1=armed forces move due to permanent change of station .....

Miles from old home to new work place .....

Miles from old home to old work place .....

Expenses for transportation and storage of household goods and personal effects .....

Lodging and travel (excluding meals):

Lodging and travel (excluding automobile) .....

Parking fees and tolls .....

Gas and oil .....

Miles driven to new home .....


(\* owned and used property as main home for at least 2 of 5 years before sale)

17, 27



2022

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US

## Rental &amp; Royalty Income (Schedule E)

No. 

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Please enter all pertinent 2022 amounts. Last year's amounts are provided for your reference.

## GENERAL INFORMATION

	2022 Amount	2021 Amount
Description of property.....		<b>Type of Property</b> 1 = Single Family Residence 2 = Multi-Family Residence 3 = Vacation/Short-Term Rental 4 = Commercial 5 = Land 6 = Royalties 7 = Self-Rental
Street address.....		
City.....		
State.....		
ZIP code.....		
Type of property (see table).....		
Other type of property.....		
Number of days rented.....	34	

Percentage of ownership

if not 100% (.xxxx).....

Percentage of tenant occupancy

if not 100% (.xxxx).....

1=spouse, 2=joint.....

1=qualified joint venture.....

1=nonpassive activity,

2=passive royalty.....

1=did not actively participate...

1=real estate professional.....

1=rental other than real estate..

1=investment.....

1=single member limited

liability company.....

If required to file Form(s) 1099, did you or will you file all required Form(s) 1099: 1=yes, 2=no .....

## INCOME

	2022 Amount	2021 Amount
Rents or royalties received.....		

## DIRECT EXPENSES

NOTE: Direct expenses are related only to the rental activity. These include rental agency fees, advertising, and office supplies.

Advertising.....		
Association dues.....		
Auto and travel (not entered elsewhere).....		
Cleaning and maintenance.....		
Commissions.....		
Gardening.....		
Insurance.....		
Legal and professional fees.....		
Licenses and permits.....		
Management fees.....		
Miscellaneous.....		
Mortgage interest (paid to banks, etc.).....		
Qualified mortgage insurance premiums.....		
Excess mortgage interest.....		
Other interest (not entered elsewhere).....		
Painting and decorating.....		
Pest control.....		
Plumbing and electrical.....		
Repairs.....		
Supplies.....		
Taxes - real estate.....		
Taxes - other (not entered elsewhere).....		
Telephone.....		
Utilities.....		
Wages and salaries.....		
Other:		

NOTE: If you purchased or disposed of any business assets, please complete Sheet 22.

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2022

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US

Partnership and S corporation Information

20.1,20.2

Please add, change or delete 2022 information as appropriate. Be sure to attach all Schedule K-1s.

### PARTNERSHIP INFORMATION (20.1)

No.	Name of Partnership	Employer Identification Number	Tax Shelter Registration Number	Additional Amounts Invested in Partnership

### S CORPORATION INFORMATION (20.2)

No.	Name of S corporation	Employer Identification Number	Tax Shelter Registration Number	Additional Amounts Invested in S corporation

20.1,20.2

**20.3,20.4**

Series: 61 Asset Disposition List

Series: 61 Asset Acquisition List



2022

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US

Vehicle Expenses

No.

22 p3

Please enter all pertinent 2022 amounts. Last year's amounts are provided for your reference.

**GENERAL INFORMATION**

	2022 Amount	2021 Amount
Description of vehicle .....		
1=no evidence to support your deduction .....		
1=no written evidence to support your deduction .....		
1=vehicle is available for off-duty personal use .....		
1=no other vehicle is available for personal use .....		
1=vehicle used primarily by more than 5% owner .....		
Number of months of business use if changed from 100% personal use .....		

**AUTOMOBILE MILEAGE**

Total mileage (for the tax year) .....		
Business mileage .....		
Commuting mileage (for the tax year) .....		
Average daily round-trip commute .....		

**ACTUAL EXPENSES**

Parking fees and tolls (business portion only) .....		
Gasoline, lube, oil .....		
Repairs .....		
Tires .....		
Insurance .....		
Miscellaneous .....		
Auto license (other than personal property taxes) .....		
Personal property taxes (based on car's value) .....		
Interest (car loan) (for Schedule C, E & F) .....		
Vehicle rent or lease payments .....		
Inclusion amount (enter as positive) .....		
Value of employer-provided vehicle on Form W-2 (2106) .....		

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Please enter all pertinent 2022 information. Last year's amounts are provided for your reference.

### TRADITIONAL IRA CONTRIBUTIONS

	2022 Amount		2021 Amount	
	Taxpayer	Spouse	Taxpayer	Spouse
IRA contributions you made or expect to make (1=maximum) (\$6,000/\$7,000 if 50 or older) .....				
Contributions made to date .....				
1=covered by plan, 2=not covered .....				
2022 payments from 1/1/23 to 4/15/23 .....				

### ROTH IRA CONTRIBUTIONS

	2022 Amount		2021 Amount	
	Taxpayer	Spouse	Taxpayer	Spouse
Roth IRA contributions you made or expect to make (1=maximum) (\$6,000/\$7,000 if 50 or older) .....				
Contributions made to date .....				

### SEP, SIMPLE AND QUALIFIED PLANS (KEOGH)

	2022 Amount		2021 Amount	
	Taxpayer	Spouse	Taxpayer	Spouse
Profit-sharing (25%/1.25) contributions you made or expect to make (1=maximum) .....				
Money purchase (25%/1.25) contributions you made or expect to make (1=maximum) .....				
Defined benefit contributions you expect to make .....				
Self-employed SEP (25%/1.25) contributions you made or expect to make (1=maximum) .....				
Plan contribution rate if not .25 (.xxxx) .....				
Individual 401k: SE elective deferrals (except Roth) (1=max.) .....				
Individual 401k: SE designated Roth contributions (1=max.) .....				
SIMPLE contributions:				
Self-employed SIMPLE contributions you made or expect to make (1=maximum) .....				
Employer matching rate if not .03 (.xxxx) .....				
1=nonelective contributions (2%) .....				
Contributions made to date .....				

### ADJUSTMENTS TO INCOME

	2022 Amount		2021 Amount	
	Taxpayer	Spouse	Taxpayer	Spouse
Self-employed health insurance:				
Total premiums (excluding long-term care) .....				
Long-term care premiums .....				
Student loan interest paid (1098-E, box 1) .....				
Educator expenses (kindergarten thru grade 12) .....				
Jury duty pay given to employer .....				
Expenses from rental of personal property .....				
Other adjustments to income:				
.....				
.....				
.....				

	Taxpayer	Spouse
Alimony paid:		
Date of divorce or sep. agreement .....		
Recipient's first name .....		
Recipient's last name .....		
Recipient's SSN .....		
Amount paid .....	2021 amt:	2021 amt:

<b>2022</b>	<b>1040</b>	<b>US</b>	<b>Itemized Deductions</b>
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**Please enter all pertinent 2022 amounts and attach all 1098 forms.  
Last year's amounts are provided for your reference.**

### MEDICAL AND DENTAL EXPENSES

NOTE: Enter self-employed health insurance premiums on Sheet 24 and Medicare insurance premiums on Sheet 14.

	2022 Amount	TS	2021 Amount
Prescription medicines and drugs .....			
Doctors, dentists and nurses .....			
Hospitals and nursing homes .....			
Insurance premiums not entered elsewhere (excl. LT care & amts. paid w/pre-tax dollars) ..			
Long-term care premiums - taxpayer .....			
Long-term care premiums - spouse .....			
Insurance reimbursement (enter as a positive number) .....			
Lodging and transportation:			
Out-of-pocket expenses .....			
Medical miles driven .....			
Other medical and dental expenses:			
.....			
.....			
.....			

### TAXES PAID (State and local withholding and 2022 estimates are automatic.)

State income taxes - 1/22 payment on 2021 state estimate .....			
State income taxes - paid with 2021 state return extension .....			
State income taxes - paid with 2021 state return .....			
State income taxes - paid for prior years and/or to other state .....			
City/local income taxes - 1/22 payment on 2021 city/local estimate .....			
City/local income taxes - paid with 2021 city/local extension .....			
City/local income taxes - paid with 2021 city/local return .....			

### SALES AND USE TAXES PAID

State and local sales taxes (except autos and special items) .....			
Use taxes paid on 2022 purchases .....			
Use taxes paid with 2021 state return .....			
Sales tax on autos not included above .....			
Sales tax on boats, aircraft, other special items .....			

### OTHER TAXES PAID

Real estate taxes - principal residence:

.....			
.....			

Real estate taxes - held for investment :

.....			
.....			
.....			

Personal property taxes (including auto fees in some states. Provide a copy of tax notice) .....

Foreign income taxes .....			
----------------------------	--	--	--

Other taxes:

.....			
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<b>2022</b>	<b>1040</b>	<b>US</b>	<b>Itemized Deductions (continued)</b>
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<b>25</b>	p2
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Please enter all pertinent 2022 amounts. Last year's amounts are provided for your reference.

### INTEREST PAID

Home mortgage int. (Box 1) and points (Box 2) reported on Form 1098:

2022 Amount

TS

2021 Amount


Home mortgage interest not reported on Form 1098:

Payee's name.....	
Payee's SSN or FEIN...	
Payee's street address..	
Payee's city.....	
Payee's state.....	
Payee's ZIP code.....	
Payee's region.....	
Payee's postal code....	
Payee's country.....	

Amount paid.....			
------------------	--	--	--

Points not reported on Form 1098:


Mortgage insurance premiums on post 12/31/06 contracts (Box 4) .....

Investment interest (interest on margin accounts):


Passive interest.....

NOTE: Points paid on loans other than to buy, build, or improve your main home are deductible over the life of the mortgage. For these types of loans also provide the dates and lives of the loans.

### CASH CONTRIBUTIONS

NOTE: No deduction is allowed for cash or check contributions unless the donor maintains a bank record, or a written communication from the donee, showing the name of the organization, contribution date(s), and contribution amount(s).

Churches, schools, hospitals, and other charitable organizations (60% limitation):

Contributions by cash or check:


Volunteer expenses (out-of-pocket) .....

Number of charitable miles .....

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Veterans' organizations, fraternal societies, nonprofit cemeteries, and certain private nonoperating foundations (30% limitation):

Contributions by cash or check:


Volunteer expenses (out-of-pocket) .....

Number of charitable miles .....

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<b>2022</b>	<b>1040</b>	<b>US</b>	<b>Itemized Deductions (continued)</b>
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Please enter all pertinent 2022 amounts. Last year's amounts are provided for your reference.

### NONCASH CONTRIBUTIONS

NOTE: Use Sheet 26 if total noncash contributions are over \$500. No deduction is allowed for contributions of clothing and household items that are not in *good* used condition or better. In addition, a deduction for any item with minimal monetary value may be denied.

50% limitation (see above):


2022 Amount	TS	2021 Amount

30% limitation (see above):


2022 Amount	TS	2021 Amount

30% capital gain property (gifts of capital gain property to 50% limit orgs.):


2022 Amount	TS	2021 Amount

20% capital gain property (gifts of capital gain property to non-50% limit orgs.):


2022 Amount	TS	2021 Amount

### STATE MISC. DEDS. IF NON-CONFORMING TO TAX CUTS & JOBS ACT (subject to 2% AGI limit)

Union and professional dues.....

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Other unreimbursed employee expenses (uniforms and protective clothing, professional subscriptions, employment agency fees, and certain edu. expenses):


2022 Amount	TS	2021 Amount

Investment expense:


2022 Amount	TS	2021 Amount

Tax return preparation fee.....

Safe deposit box rental.....

2022 Amount	TS	2021 Amount

Miscellaneous deductions (2% AGI) (certain legal and accounting fees, and custodial fees):


2022 Amount	TS	2021 Amount

<b>25</b> p3
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**OTHER MISCELLANEOUS DEDUCTIONS**

2022 Amount

TS

2021 Amount

Other miscellaneous deductions:

This image shows a single page of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.[illegible]

**If either of the following conditions below apply to you, your home mortgage interest deduction may need to be limited and the input section provided below should be completed. If neither condition applies, enter home mortgage interest amounts on organizer sheet 25 p2.**

1. Total home equity debt exceeded \$100,000 at any time during 2022 (\$50,000 if married filing separate). For this purpose, home equity debt is defined as any mortgages taken out in which the proceeds were used to buy, build, or improve your home.
2. Total home acquisition debt exceeded \$750,000 at any time during 2022 (\$375,000 if married filing separate). For this purpose, home acquisition debt is defined as any mortgages taken out after October 13, 1987 in which the proceeds were used to buy, build, or improve your home.

NOTE: When completing the input section below, grandfather debt represents loans taken out prior to October 14, 1987.

**Please enter all pertinent 2022 amounts and attach all 1098 forms.  
Last year's amounts are provided for your reference.**

	2022 Amount	TS	2021 Amount
Fair market value of the property on the date that the last debt was secured . . . . .			
Home acquisition and grandfather debt on the date that the last debt was secured . . . . .			

## LOAN INFORMATION

Loan #1

Lender's name.....

Form (see table).....

Number of form.....

1=taxpayer, 2=spouse, blank=joint.....

Interest paid.....

Points paid.....

Total principal paid.....

Lump sum principal payment (if paid off).....

Months outstanding (if not 12).....

1=home acquisition debt incurred after 12/15/17.....

Home acquisition debt balance - beginning of year.....

Home acquisition debt borrowed in 2022.....

Home equity debt balance - beginning of year.....

Home equity debt borrowed in 2022.....

Grandfather debt balance - beginning of year.....

[illegible]

Loan #2

Lender's name.....

Form (see table).....

Number of form.....

1=taxpayer, 2=spouse, blank=joint.....

Interest paid.....

Points paid.....

Total principal paid.....

Lump sum principal payment (if paid off).....

Months outstanding (if not 12).....

1=home acquisition debt incurred after 12/15/17.....

Home acquisition debt balance - beginning of year.....

Home acquisition debt borrowed in 2022.....

Home equity debt balance - beginning of year.....

Home equity debt borrowed in 2022.....

Grandfather debt balance - beginning of year.....

[illegible]

## Form

- 1 = Schedule A (default)  
2 = Business use of home  
3 = Schedule E

**Please enter all pertinent 2022 amounts and attach all 1098 forms.  
Last year's amounts are provided for your reference.**

**LOAN INFORMATION (continued)**

### Loan #3

Lender's name.....

Form (see table).....

Number of form.....

1=taxpayer, 2=spouse, blank=joint.....

Interest paid.....

Points paid.....

Total principal paid.....

Lump sum principal payment (if paid off).....

Months outstanding (if not 12).....

1=home acquisition debt incurred after 12/15/17.....

Home acquisition debt balance - beginning of year.....

Home acquisition debt borrowed in 2022.....

Home equity debt balance - beginning of year.....

Home equity debt borrowed in 2022.....

Grandfather debt balance - beginning of year.....

2022 Amount

TS

2021 Amount

[illegible]

Loan #4

Lender's name.....

Form (see table).....

Number of form.....

1=taxpayer, 2=spouse, blank=joint.....

Interest paid.....

Points paid.....

Total principal paid.....

Lump sum principal payment (if paid off).....

Months outstanding (if not 12).....

1=home acquisition debt incurred after 12/15/17.....

Home acquisition debt balance - beginning of year.....

Home acquisition debt borrowed in 2022.....

Home equity debt balance - beginning of year.....

Home equity debt borrowed in 2022.....

Grandfather debt balance - beginning of year.....

[illegible]

## Form

- 1 = Schedule A (default)  
2 = Business use of home  
3 = Schedule E



2022

1040

US

Noncash Contributions (Form 8283)

26

If your total noncash contributions are in excess of \$500 in 2022, please complete the information below for each donee using the following guidelines:

\* If you contributed a motor vehicle, boat, or airplane with a claimed value of more than \$500, attach Form 1098-C or other written acknowledgement received from the donee organization.

\* A deduction for contributions of clothing or other household items that are not in *good* used condition or better is not allowed. In addition, a deduction for any item with minimal monetary value may be denied. However, these rules do not apply to any contribution of a single item for which a deduction of more than \$500 is claimed, if a qualified appraisal for the donated property is provided.

### DONATED PROPERTY INFORMATION

No. <input type="text"/>	Name of charitable organization (donee) .....		
	Street address .....		
	City .....		
	State .....		
	ZIP code .....		
	1=spouse, 2=joint .....		
	Property description (other than vehicle) .....		
	Vehicle	Identification number (VIN) .....	
		Year (yyyy) .....	
		Make and model .....	
		Condition and mileage .....	
	Date of contribution (m/d/y) .....		
Date acquired by donor (m/y) .....			
How acquired by donor (Table 1 or describe) .....			
Donor's cost or basis .....			
Fair market value .....			
Method used to determine FMV (Table 2 or describe) .....			

No. <input type="text"/>	Name of charitable organization (donee) .....		
	Street address .....		
	City .....		
	State .....		
	ZIP code .....		
	1=spouse, 2=joint .....		
	Property description (other than vehicle) .....		
	Vehicle	Identification number (VIN) .....	
		Year (yyyy) .....	
		Make and model .....	
		Condition and mileage .....	
	Date of contribution (m/d/y) .....		
Date acquired by donor (m/y) .....			
How acquired by donor (Table 1 or describe) .....			
Donor's cost or basis .....			
Fair market value .....			
Method used to determine FMV (Table 2 or describe) .....			

<p><b>1 How Property was Acquired</b></p> <p>1 = Purchase      3 = Inheritance 2 = Gift          4 = Exchange</p>	<p><b>2 Method Used to Determine FMV</b></p> <p>1 = Appraisal      3 = Catalog 2 = Thrift shop value      4 = Comparable sales</p> <p>For other methods, see IRS Pub. 561.</p>
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26

2022

1040

US

Business Use of Home (Form 8829)

No. 

29

Please enter 2022 indirect expenses in full. Nonbusiness portion will carry to Schedule A.  
Business percentage will be applied to indirect expenses only.

**BUSINESS USE OF HOME**

Form .....  
 Number of form (e.g., enter 2 for Schedule C number 2) .....  
 Business use area (square footage) .....  
 Total area of home (square footage) .....  
 Total hours facility used (for daycare facilities only) .....  
 Total hours available (if not 8,760) .....  
 Area of home included above used exclusively for daycare business, if any (sq ft) .....  
 % (.xx) or amount of gross income from home if not 100% (-1 if none) .....  
 % (.xx) or amount of expenses from home if not 100% (-1 if none) .....

2022 Amount

2021 Amount

**INDIRECT EXPENSES**

NOTE: Indirect expenses are for keeping up and running your entire home.  
They benefit both the business and personal parts of your home.

Mortgage interest .....  
 Real estate taxes .....  
 Casualty losses .....  
 Insurance .....  
 Miscellaneous .....  
 Rent .....  
 Repairs and maintenance .....  
 Utilities .....  
 Excess mortgage interest .....  
 Excess real estate taxes .....  
 Other indirect expenses:

**DIRECT EXPENSES**

NOTE: Direct expenses benefit only the business part of your home. They include  
painting or repairs made to specific areas or rooms used for business.

Mortgage interest .....  
 Real estate taxes .....  
 Casualty losses .....  
 Insurance .....  
 Miscellaneous .....  
 Rent .....  
 Repairs and maintenance .....  
 Utilities .....  
 Excess mortgage interest .....  
 Excess real estate taxes .....  
 Excess casualty losses .....  
 Allowable casualty losses .....  
 Other direct expenses:

29

2022

1040

US

Employee/Vehicle Bus. Exp. (Form 2106)

No.

30

Please enter all pertinent 2022 amounts. Last year's amounts are provided for your reference.

### GENERAL INFORMATION

Occupation, if different from Form 1040 .....

Form .....

Number of form (1=first Schedule C, 2=second, etc.) .....

1=spouse .....

1=performance artist, 2=handicapped, 3=fee-basis government official .....

1=minister's expenses .....


### EMPLOYEE BUSINESS EXPENSES

Meal expenses from restaurants in full .....

Meal expenses from sources other than restaurants .....

Reimbursements for meals not on W-2, box 1 .....

1=Department of Transportation (80% meal allowance) .....

Local transportation (bus, taxi, train, etc.) .....

Travel expenses while away from home overnight .....

Reimbursements not included on Form W-2, box 1 .....

Other business expenses:

2022 Amount

2021 Amount



30

2022

1040

US

## Vehicle Expenses (Form 2106) (cont.)

No.

30 p2

Please enter all pertinent 2022 amounts. Last year's amounts are provided for your reference.

## VEHICLE INFORMATION

- 1=vehicle used primarily by more than 5% owner .....
- 1=vehicle is available for off-duty personal use .....
- 1=no other vehicle is available for personal use .....
- 1=no evidence to support your deduction .....
- 1=no written evidence to support your deduction .....

2022 Amount

2021 Amount


## VEHICLE 1

- Description of vehicle .....
- Date placed in service (m/d/y) .....
- Total mileage (for the tax year) .....
- Business mileage .....
- Commuting mileage (for the tax year) .....
- Average daily round-trip commute .....
- Number of months of business use if changed from 100% personal use .....
- Parking fees and tolls (business portion only) .....


## Actual expenses:

- Gasoline, lube, oil .....
- Repairs .....
- Tires .....
- Insurance .....
- Miscellaneous .....
- Auto license (other than personal property taxes) .....
- Personal property taxes (based on car's value) .....
- Interest (car loan) (for Schedule C, E & F) .....
- Vehicle rent or lease payments .....
- Inclusion amount (enter as positive) .....
- Value of employer-provided vehicle on Form W-2 (2106) .....


## VEHICLE 2

- Description of vehicle .....
- Date placed in service (m/d/y) .....
- Total mileage (for the tax year) .....
- Business mileage .....
- Commuting mileage (for the tax year) .....
- Average daily round-trip commute .....
- Number of months of business use if changed from 100% personal use .....
- Parking fees and tolls (business portion only) .....


## Actual expenses:

- Gasoline, lube, oil .....
- Repairs .....
- Tires .....
- Insurance .....
- Miscellaneous .....
- Auto license (other than personal property taxes) .....
- Personal property taxes (based on car's value) .....
- Interest (car loan) (for Schedule C, E and F) .....
- Vehicle rent or lease payments .....
- Inclusion amount (enter as positive) .....
- Value of employer-provided vehicle on Form W-2 (2106) .....


30 p2

2022

1040

US

Foreign Income Exclusion (Form 2555)

No.

31.1

Please enter all pertinent 2022 information.

**GENERAL INFORMATION**

1=spouse.....

Foreign address of taxpayer, if different from Form 1040:

Street address.....

City.....

Region.....

Postal code.....

Country.....

Employer:

Name.....

U.S. street address.....

U.S. city.....

U.S. state.....

U.S. ZIP code.....

Foreign street address.....

Foreign city.....

Foreign region.....

Foreign postal code.....

Foreign country.....

Employer type: 1=foreign entity, 2=U.S. company,  
3=self, 4=foreign affiliate of U.S. company, 5=other.....

Employer type, if other.....

Type of exclusion revoked if revoked in earlier year (if applicable):

Tax year revocation was effective

Country of citizenship.....

City and country of separate foreign residence if maintained due to  
adverse living conditions (if applicable):Number of days during tax year at separate  
foreign address (if applicable)

Tax homes(s) during tax year:

Dates tax home(s) were  
established (m/d/y)

31.1

2022

1040

US

Foreign Income Exclusion (2555)

No. 

31.1 p2

Please enter all pertinent 2022 information.

**TRAVEL INFORMATION**

NOTE: Please enter all travel for 2022 as well as travel for 2023 known to date.

Travel Type (table)	Name of country (if not United States)	Date arrived	Date left	Days in U.S. on business

**BONA FIDE RESIDENCE TEST AND PHYSICAL PRESENCE TEST**

Beginning date for bona fide residence (m/d/y) .....

Ending date for bona fide residence (m/d/y) .....

Living quarters in foreign country: 1=purchased home, 2=rented house or apartment, 3=rented room, 4=quarters furnished by employer .....

Names of family living abroad with taxpayer (if applicable):

Relationship

Period family lived abroad


1=submitted statement to country of bona fide residence .....

1=required to pay income tax to country of bona fide residence .....

Contractual terms relating to length of employment abroad .....

Type of visa you entered foreign country under .....

Explanation why visa limited stay or employment in country (if applicable) .....

Address of home in U.S. maintained while living abroad (if applicable):

ZIP Code

1=U.S. home rented (if applicable)


Names of occupants in U.S. home (if applicable)

Relationship of occupants in U.S. home (if applicable)


Principal country of employment .....

**FOREIGN HOUSING EXPENSES**

2022 Amount

2021 Amount

Qualified housing expenses .....

Location of housing expenses:

Qualifying days in location (multiple locations only)


**Travel Type**

- 1 = Travel to U.S. (default)  
 2 = Travel to foreign country  
 3 = Travel to restricted country

31.1 p2

2022

1040

US

Foreign Income Exclusion (Form 2555)

No.

31.2

Please enter all pertinent 2022 amounts and attach all W-2 forms, or other wage statements.  
Enter amounts in U.S. dollars only. Last year's amounts are provided for your reference.

**FOREIGN WAGES, SALARIES, TIPS**

	2022 Amount	2021 Amount
Name or number.....		
1=spouse.....		
1=retirement plan (Box 13).....		
Name of employer (Box c).....		
Wages, tips, other compensation (Box 1).....		
Federal income tax withheld (Box 2).....		
Social security tax withheld (Box 4).....		
Medicare tax withheld (Box 6).....		
State income tax withheld (Box 17).....		
Local income tax withheld (Box 19).....		

**FOREIGN ALLOWANCES, REIMBURSEMENTS AND OTHER EARNED INCOME****Noncash Income**

Home (lodging).....		
Meals.....		
Car.....		
Other properties or facilities:		

**Allowances and Reimbursements**

Cost of living and overseas differential.....		
Family.....		
Education.....		
Home leave.....		
Quarters.....		
Other purposes:		

Meals and lodging provided for the convenience of the  
Employer (excludable under section 119).....

--	--

**Other Foreign Earned Income**


**2022 Days Worked Allocation Information**

Total number of days worked (if not 240).....		
Total days worked before and after foreign assignment.....		
Foreign days worked before and after foreign assignment.....		

31.2

2022

1040

US

Health Savings Accounts (8889)

32.1

Please enter all pertinent 2022 amounts & attach all 1099-SA forms.  
Last year's amounts are provided for your reference.

### HSA CONTRIBUTIONS

NOTE: Contributions to an HSA are only eligible to persons covered under a high deductible health plan. For tax year 2022, a high deductible health plan is one with an annual deductible that is not less than \$1,400 for self-only coverage or \$2,800 for family coverage, and the annual out-of-pocket expenses (deductibles, co-payments, and other amounts, but not premiums) do not exceed \$7,050 for self-only coverage or \$14,100 for family coverage.

	2022 Amount		2021 Amount	
	Taxpayer	Spouse	Taxpayer	Spouse
1=self-only coverage, 2=family coverage .....				
HSA contributions you made or expect to make, except rollovers, employer contributions, and contributions made to an employee account through a cafeteria plan (1=maximum) .....				
Contributions included above that were made after you became eligible for Medicare .....				
Contributions made to date .....				

### HSA DISTRIBUTIONS

Total HSA distribution received (1099-SA, box 1) ..				
Distributions included above that were rolled over to another HSA .....				
Total unreimbursed qualified medical expenses .....				

32.1



2022

1040

US

## Child and Dependent Care Expenses (Form 2441)

33.1,33.2

Please enter all pertinent 2022 information. Last year's amounts are provided for your reference. You must have paid for the care of one or more dependents enabling you to work or attend school to qualify for this credit.

**DEPENDENT CARE EXPENSES (33.1)**

	2022 Amount		2021 Amount	
	Taxpayer	Spouse	Taxpayer	Spouse
Dependent care expenses incurred but not paid in 2022				
Employer-provided benefits forfeited in 2022				

**PERSONS AND EXPENSES QUALIFYING FOR DEPENDENT CARE CREDIT**

No. <input type="text"/>	First name .....		
	Last name .....		
	Title or suffix .....		
	Date of birth (m/d/y) .....		
	Social security number .....		
	Qualified dependent care expenses incurred and paid in 2022		2021 amt:
	1=disabled .....		
	1=spouse, 2=joint .....		

No. <input type="text"/>	First name .....		
	Last name .....		
	Title or suffix .....		
	Date of birth (m/d/y) .....		
	Social security number .....		
	Qualified dependent care expenses incurred and paid in 2022		2021 amt:
	1=disabled .....		
	1=spouse, 2=joint .....		

**PERSONS OR ORGANIZATIONS PROVIDING CARE (33.2)**

No. <input type="text"/>	Name of provider .....		
	Street address .....		
	City .....		
	State .....		
	ZIP code .....		
	Foreign region .....		
	Foreign postal code .....		
	Foreign country .....		
	Identification number (SSN or EIN) .....		
	Amount paid to care provider in 2022		2021 amt:
	1=spouse, 2=joint .....		

33.1,33.2

2022

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US

Qualified Adoption Expenses (Form 8839)

37

Please enter all pertinent 2022 information. Last year's amounts are provided for your reference.

## ELIGIBLE CHILDREN

		2022 Amount	2021 Amount	
No. <input type="text"/>	First name.....			
	Last name.....			
	Identification number.....			
	Date of birth (m/d/y).....			
	1=born before 2005 and was disabled.....			
	1=special needs child.....			
	1=foreign child.....			
	1=adoption was not final in 2022.....			
	Qualified Adoption Expenses Paid in	2021 for adoption not finalized by end of 2022.....		
		Prior years for adoption of foreign child finalized in 2022.....		
2021 and 2022 for adoption finalized in 2022.....				
2022 for adoption finalized before 2022.....				
1=spouse, 2=joint.....				
No. <input type="text"/>	First name.....			
	Last name.....			
	Identification number.....			
	Date of birth (m/d/y).....			
	1=born before 2005 and was disabled.....			
	1=special needs child.....			
	1=foreign child.....			
	1=adoption was not final in 2022.....			
	Qualified Adoption Expenses Paid in	2021 for adoption not finalized by end of 2022.....		
		Prior years for adoption of foreign child finalized in 2022.....		
2021 and 2022 for adoption finalized in 2022.....				
2022 for adoption finalized before 2022.....				
1=spouse, 2=joint.....				
No. <input type="text"/>	First name.....			
	Last name.....			
	Identification number.....			
	Date of birth (m/d/y).....			
	1=born before 2005 and was disabled.....			
	1=special needs child.....			
	1=foreign child.....			
	1=adoption was not final in 2022.....			
	Qualified Adoption Expenses Paid in	2021 for adoption not finalized by end of 2022.....		
		Prior years for adoption of foreign child finalized in 2022.....		
2021 and 2022 for adoption finalized in 2022.....				
2022 for adoption finalized before 2022.....				
1=spouse, 2=joint.....				

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2022

1040

US

Education Credits / Tuition Deduction

No.

38

Please complete the information below if you paid qualified education expenses in 2022 for you, your spouse, or your dependents enrolled in an accredited postsecondary institution. Last year's amounts are provided for your reference.

**STUDENT INFORMATION**

1=taxpayer, 2=spouse.....  
 First name.....  
 Last name.....  
 Social security number.....  
 Number of years hope credit claimed.....  
 Number of prior years AOC claimed.....

1=student was NOT enrolled at least half-time for at least one academic period that began in 2022 (or the first 3 months of 2023 if the qualified expenses were made in 2022) at an eligible institution in a qualified program.....

1=student completed first four years of post-secondary education before 2022  
 1=student was convicted, before the end of 2022, of a felony for possession or distribution of a controlled substance.....

**EDUCATIONAL INSTITUTION ATTENDED (#1)**

Name.....  
 Street address.....  
 City.....  
 State.....  
 ZIP code.....  
 1=2022 Form 1098-T was NOT received.....  
 1=2022 Form 1098-T received with Box 2 & 7 completed.....  
 1=2021 Form 1098-T received with Box 2 & 7 completed.....  
 Federal ID number from Form 1098-T.....

**EDUCATIONAL INSTITUTION ATTENDED (#2)**

Name.....  
 Street address.....  
 City.....  
 State.....  
 ZIP code.....  
 1=2022 Form 1098-T was NOT received.....  
 1=2022 Form 1098-T received with Box 2 & 7 completed.....  
 1=2021 Form 1098-T received with Box 2 & 7 completed.....  
 Federal ID number from Form 1098-T.....

**QUALIFIED EDUCATION EXPENSES**

Qualified tuition & fees paid in 2022 (net of refund or assistance, & not entered elsewhere).....  
 Books & supplies required to be purchased from institution.....  
 Books & supplies not entered above.....  
 Amount of prior year refund or assistance \*.....

2022 Amount

2021 Amount

\* Refund of qualified expenses and tax-free educational assistance received after you file your return for the year in which the expenses were paid.

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**2022****1040****US****Household Employment Taxes (Schedule H)****42**

Please enter all pertinent 2022 information. Last year's amounts are provided for your reference.

## HOUSEHOLD EMPLOYMENT TAXES

NOTE: If you paid any one household employee cash wages of \$2,400 or more in 2022; withheld federal income tax during 2022 for any household employee; or paid total cash wages of \$1,000 or more in any calendar quarter of 2021 or 2022 to household employees, please complete the following:

Employer identification number .....  
1=spouse, 2=joint .....


Social security, Medicare and income taxes:

**2022 Amount****2021 Amount**

1=paid any one employee cash wages of \$2,400 or more .....

1=withheld federal income tax for household employee .....

Total cash wages subject to social security taxes .....

Total cash wages subject to Medicare taxes .....

Federal income tax withheld .....

Taxes withheld from state disability payments .....


Federal unemployment tax:

1=paid total cash wages of \$1,000 or more in any calendar quarter of 2021 or 2022 .....

Total cash wages subject to FUTA tax .....

1=paid unemployment contributions to only one state .....

1=paid all state unemployment contributions by 4/17/23 .....

1=all wages taxable for FUTA were also taxable for state unemployment .....

Name of state .....

Contributions paid to state unemployment fund .....


**42**

2022

1040

US

Parent's Election to Report Child's Inc.

No.

44

Please enter all pertinent 2022 amounts & attach all 1099-INT and 1099-DIV forms.  
Last year's amounts are provided for your reference.

**CHILD'S INFORMATION**

First name.....

Last name.....

Social security number.....

Date of birth (m/d/y).....

1=nontaxable to federal.....

1=nontaxable to state.....

**INTEREST INCOME (Form 1099-INT)**

Banks, credit unions, etc. (Box 1):

2022 Amount

2021 Amount

U.S. bonds, T-bills, etc. (nontaxable to state) (Box 3):

Tax-exempt interest:

Total municipal bonds.....

In-state municipal bonds.....

Adjustments:

Nominee distribution.....

Accrued interest.....

Tax-exempt interest (1099-INT in error).....

OID adjustment.....

ABP adjustment.....

Foreign:

1=interest in or authority over foreign account.....

Name of foreign country.....

1=grantor/transferor or received distribution from foreign trust.....

Post 8/7/86 private activity bond interest (included above) (6251).....

**DIVIDEND INCOME (Form 1099-DIV)**

Total ordinary dividends (Box 1a):

Qualified dividends (Box 1b).....

Total capital gain distributions (Box 2a):

Unrecaptured section 1250 gain (Box 2b).....

Section 1202 gain (Box 2c).....

Collectibles (28%) gain (Box 2d).....

Nontaxable distributions (Box 3).....

Tax-exempt interest:

Total municipal bonds.....

In-state municipal bonds.....

Nominee distributions:

Ordinary dividends.....

Qualified dividends.....

Capital gain distributions.....

Alaska permanent fund dividends included above.....

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## Report of Foreign Bank and Financial Accounts

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Please enter all pertinent 2022 amounts. Last year's amounts are provided for your reference.

## GENERAL INFORMATION

	2022 Amount	2021 Amount
Canadian province or Mexican state .....		
Other type of filer .....		
Foreign identification:		
Taxpayer:		
1=passport, 2=foreign TIN .....		
Other type of identification .....		
Number .....		
Country of issue .....		
Spouse:		
1=passport, 2=foreign TIN .....		
Other type of identification .....		
Number .....		
Country of issue .....		
Taxpayer:		
Title .....		
Spouse:		
Title .....		

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Report of Foreign Bank &amp; Fin. Accts.

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Please enter all pertinent 2022 amounts. Last year's amounts are provided for your reference.

### INFORMATION ON FINANCIAL ACCOUNTS

1=spouse.....  
 Type of account: 1=bank account, 2=securities account, or specify .....  
 Maximum value of account (-1 if unknown) .....

Financial institution:

Name of institution (Line 1) (mandatory) .....  
 Name of institution (Line 2) .....  
 Mailing address.....  
 Account number.....  
 City.....  
 State.....  
 ZIP/postal code.....  
 Country (if not US).....

Accounts owned jointly:

Number of joint owners (Mandatory for Part III accounts) (-1 if joint owner is joint filer) ....

Principal joint owner:

Taxpayer identification number, if not joint filer .....  
 TIN type: 1=EIN, 2=SSN/ITIN, 3=foreign, 4=unknown.....  
 Last name.....  
 First name.....  
 Middle initial.....  
 Address.....  
 City.....  
 State.....  
 ZIP/postal code.....  
 Country (if not US).....

Accounts where filer has no financial interest:

Last name or org. name (mandatory) .....  
 First name.....  
 Middle initial.....  
 Taxpayer identification number.....  
 TIN type: 1=EIN, 2=SSN/ITIN, 3=foreign, 4=unknown.....  
 Address.....  
 City.....  
 State.....  
 ZIP/postal code.....  
 Country (if not US).....  
 Filer's title.....

2022 Amount

2021 Amount

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<b>2022</b>	<b>1040</b>	<b>US</b>	<b>Foreign Reporting (8938)</b>
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Please enter all pertinent 2022 amounts. Last year's amounts are provided for your reference.

**FOREIGN DEPOSIT AND CUSTODIAL ACCOUNTS (Part I)**

	2022 Amount	2021 Amount
Description of asset .....		
Type of account: 1=deposit, 2=custodial .....		
Use financial institution information from Form 114 .....		
Financial institution information (if not filing Form 114):		
Maximum value of account during year .....		
Name of institution .....		
Account number (mandatory for part I) .....		
Mailing address of institution .....		
City of institution .....		
State/province of institution .....		
Postal code of institution .....		
Country of institution .....		
1=account opened during year .....		
1=account closed during year .....		
1=account jointly owned with spouse .....		
1=no tax item in Part III with respect to this account .....		
1=used foreign currency exchange rate to convert value to US dollars .....		
Foreign currency in which account is maintained .....		
Foreign currency exchange rate (xxxx.xxxx) .....		
Source of exchange rate .....		

**OTHER FOREIGN ASSETS (Part II)**

Identifying number or other designation (mandatory for part II) .....	
Date asset acquired during year (m/d/y) .....	
Date asset disposed of during year (m/d/y) .....	
1=jointly owned with spouse .....	
1=no tax item in Part III with respect to this asset .....	
Maximum value of asset during year .....	
1=used foreign currency exchange rate to convert value to US dollars .....	
Foreign currency in which asset is denominated .....	
Foreign currency exchange rate (xxxx.xxxx) .....	
Source of exchange rate .....	
Foreign entity information (complete if stock or interest):	
Name of entity .....	
Type of entity .....	
Mailing address of entity .....	
City of entity .....	
State/province of entity .....	
Postal code of entity .....	
Country of entity .....	

**1****Type of Entity**

- 1 = Partnership
- 2 = Corporation
- 3 = Trust
- 4 = Estate

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Foreign Reporting (8938) (continued)

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Please enter all pertinent 2022 amounts. Last year's amounts are provided for your reference.

### OTHER FOREIGN ASSETS (Part II) (continued)

Issuer or counterparty (#1):

Name .....  
 1=issuer, 2=counterparty .....  
 Type of issuer or counterparty (see table 2) .....  
 Issuer or counterparty: 1=US person, 2=foreign person .....  
 Mailing address .....  
 City .....  
 State/province .....  
 Postal code .....  
 Country .....


Issuer or counterparty (#2):

Name .....  
 1=issuer, 2=counterparty .....  
 Type of issuer or counterparty (see table 2) .....  
 Issuer or counterparty: 1=US person, 2=foreign person .....  
 Mailing address .....  
 City .....  
 State/province .....  
 Postal code .....  
 Country .....


Issuer or counterparty (#3):

Name .....  
 1=issuer, 2=counterparty .....  
 Type of issuer or counterparty (see table 2) .....  
 Issuer or counterparty: 1=US person, 2=foreign person .....  
 Mailing address .....  
 City .....  
 State/province .....  
 Postal code .....  
 Country .....


Issuer or counterparty (#4):

Name .....  
 1=issuer, 2=counterparty .....  
 Type of issuer or counterparty (see table 2) .....  
 Issuer or counterparty: 1=US person, 2=foreign person .....  
 Mailing address .....  
 City .....  
 State/province .....  
 Postal code .....  
 Country .....


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#### Type of Issuer or Counterparty

- 1 = Individual
- 2 = Partnership
- 3 = Corporation
- 4 = Trust
- 5 = Estate

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Series: Additional Information