

# Susan Does Taxes LLC

## PERSONAL TAX & ACCOUNTING SOLUTIONS

8 West Main Street | Houston, PA 15342 | (742) 242-7722 | [www.SusanDoesTaxes.com](http://www.SusanDoesTaxes.com)

### 2022 TAX YEAR PREPARATION SHEET

*The following items are not inclusive, nor do they apply to every taxpayer's filing. It simply serves to remind individuals of forms that can/will impact any submission sent to federal, state, or local tax officials.*

#### **Personal Information:**

Full name & social security numbers for self, spouse, & all dependents  
State issued photo id for all individuals filing (primary, spouse, and any filing dependents)  
Prior Years' Tax Returns (if not prepared by SusanDoesTaxes LLC in prior years)  
Childcare provider tax ID or Social Security Number & Address (include camps & babysitters)  
529 contribution beneficiaries' Social Security Number(s)  
Death Certificate copy for loss of spouse in the tax year or the prior year

#### **Employment & Income Data:**

W2's for all jobs worked during tax year  
Partnership & trust income (Form K-1)  
Pensions & annuities (1099-R)  
Alimony received if divorce settled prior to January 1, 2019  
Jury duty payment  
Gambling & lottery winnings/losses (Form W-2G)  
Prizes & awards Scholarships & fellowships  
State & local income tax refund (Form 1099-G)  
Unemployment compensation (Form 1099-G)

#### **Homeowner/Renter Data:**

Residential address(-es) for the tax year  
Mortgage interest (Form 1098)  
Sale of home or real estate other than primary residence (Form 1099-S)  
HUD settlement statements from sale/purchase of new/old property  
Second mortgage interest paid statements (Form 1098)  
Real estate taxes paid (include county, borough, school, etc.)  
Rent paid during tax year & name of landlord  
Moving expenses for military families

#### **Financial Assets:**

Interest income statements (Forms 1099-INT & 1099-OID)  
Dividend income statements (Form 1099-DIV)  
Proceeds from broker transactions (Form 1099-B)  
Cost basis of stocks sold in the tax year (from broker statements)  
Miscellaneous income including rent & non-employee compensation (Form 1099-MISC)  
Retirement plan distribution (Form 1099-R)

#### **Financial Liabilities:**

Auto loans & leases (invoice with car value & lease/finance payments) for vehicle(s) used for business  
Student loan interest paid  
Early withdrawal penalties on CDs & other time deposits

*(continued on next page)*

**Automobiles, Boats, Snowmobiles, Trailers etc.:**

Personal property tax information (registrations)

**Expenses:**

Charitable donations & separate total for non-cash donations; receipts required for all donations

Unreimbursed expenses related to charity/volunteer work

Unreimbursed expenses related to your job (include travel expenses, entertainment, uniforms, union dues, subscriptions, & mileage to second job or multiple work sites)

Investment expenses

Job-hunting expenses

Education expenses

Childcare expenses

Medical savings accounts statements

Adoption expenses

Alimony paid if divorce settled prior to January 1, 2019

Tax return preparation expenses & fees

**Self-Employment Data:**

K-1 on all partnerships

Receipts/documentation for business-related income/expenses

Farm income documentation

1099 Miscellaneous received

**Deduction Documents:**

State & local income tax & estimated tax paid

IRA, Keogh, & other retirement plan contributions

Medical expenses

***Remember:*** Whether utilizing our contactless drop box or Secure File Pro (Portal), we will need images of your state photo ID, birthdates, Social Security numbers, and full name for all dependents and individuals filing. Photocopies, scans, or digital images taken with a smartphone can be used.