**INCOME TAX ORGANIZER FOR TAX YEAR 2022**

**PERSONAL INFORMATION Vanderzee Financial**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Description | Taxpayer | | Spouse | |
| Full Name: |  | |  | |
| DOB: |  | |  | |
| Occupation: |  | |  | |
| Social Security #: |  | |  | |
| Full year resident state: | | **Part year resident state:** | | **Nonresident state(s): , ,** |

**CONTACT INFORMATION**

|  |  |  |
| --- | --- | --- |
| **Description** | **Information** | |
| **Mailing/Street Address** |  | |
| **Phone Number(s):** |  |  |
| **Email Address(es)** |  |  |

**DEPENDENT INFORMATION**

|  |  |  |  |
| --- | --- | --- | --- |
| **Full Name** | **­­­­SSN (if new)** | **Birthdate** | **Income (if >$4200)** |
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**IDENTITY PROTECTION PIN**

If the taxpayer and/or spouse is an identity theft victim who has been validated by the IRS and has received a CP01A letter that contains an Identity Protection PIN, provide the PIN here. Do not enter leading zeros.

***Taxpayer identity theft PIN:*** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ ***Spouse’s identity theft PIN***: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**THINGS TO BRING (IF APPLICABLE)**

* + LAST YEAR’S TAX RETURN (IF NEW CLIENT)
  + W-2 FORM(S) FOR WAGES
  + 1099 Form(s) for Interest, Dividends, Retirement, Social Security, Unemployment & Other Income
  + Amount of EIP (Stimulus) Received
  + IRA Year end Statements
  + K-1’s from Partnerships, Corporations or Estates
  + Statements for Assets held Outside the USA
  + Cryptocurrency (e.g., Bitcoin) Sales/Earnings)
  + Business/Rental/Farm Income & Expenses
  + Records of Estimated Taxes Paid
  + HSA forms (1099-SA & 5498-SA)
  + Childcare Provider Information
  + Property Tax Statements
  + 1098 Form(s) – Mortgage Interest, Tuition, Student Loans, Vehicle/Boat Donations
  + Closing Papers for Purchases & Sales (including purchase and sale dates & amounts)
  + All other statements showing Income
  + Charitable Contribution Details
  + Voided Check for Direct Deposit
  + Form(s) 1095 for Health Insurance
  + Copy of Driver’s License (front & back) for Taxpayer & Spouse
  + Pandemic Related Business Loans/Credits (details)

|  |  |
| --- | --- |
| **PANDEMIC RELATED BUSINESS LOANS/CREDITS** | **ADJUSTMENTS** |
| Amount of PPP Loan Forgiveness…………… $\_\_\_\_\_\_\_\_\_  EIDL Loan Advance Payment………………… $\_\_\_\_\_\_\_\_\_  Employee Retention Credits…………………. $\_\_\_\_\_\_\_\_\_ | Alimony Paid (if divorce agreement entered on or before Dec. 31st, 2018)  $\_\_\_\_\_\_\_\_\_\_\_\_ SSN of recipient: \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_  Self-Employed Health Insurance……………. $\_\_\_\_\_\_\_\_\_\_\_\_  Classroom Materials for Educators………… $\_\_\_\_\_\_\_\_\_\_\_ |
| **SALE OF PROPERTY** |
| Item: Cost: Sale  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ $ \_\_\_\_\_\_\_\_\_\_ $\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ $ \_\_\_\_\_\_\_\_\_\_ $\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ $ \_\_\_\_\_\_\_\_\_\_ $\_\_\_\_\_\_\_\_\_ |
| **ADOPTION EXPENSES** |
| Amount Paid: $\_\_\_\_\_\_\_\_\_\_\_  Date Finalized: \_\_\_\_\_\_\_\_\_\_\_ |
| **OTHER INCOME** |
| Gambling Winnings……………………… $\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Cryptocurrency sales/earnings….... $\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | **Energy Credits/Plug-in Vehicle** |
| (Bring receipts & details)  SOLAR WIND GEOTHERMAL PLUG-IN VEHICLE |

|  |  |
| --- | --- |
| **CAUSUALTY & THEFT LOSSES** | **CONTRIBUTIONS** |
| Cost of Property Lost……………………. $\_\_\_\_\_\_\_\_\_\_\_\_\_\_    Fair Market Value………………………… $\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Insurance Reimbursement Received… $\_\_\_\_\_\_\_\_\_\_\_\_  FEDERALLY DECLARED DISASTER ZONE?  Yes\_\_\_\_ No\_\_\_\_ (***Bring details***) | Churches (receipted)…………………………….. $\_\_\_\_\_\_\_\_\_\_\_\_  Other Donations of Money (receipted)…. $\_\_\_\_\_\_\_\_\_\_\_\_  Charitable Auto Mileage…………………. \_\_\_\_\_\_\_\_\_\_\_miles  Volunteer Expenses (receipted)…………….. $\_\_\_\_\_\_\_\_\_\_\_\_  Property Donated (for which you have receipts)  Fair Market Value (bring documentation if over $500)  $\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Auto, Boat Donations (Form 1098-C)…….. $\_\_\_\_\_\_\_\_\_\_\_\_  Qualified Charitable Distribution from IRA  Yes\_\_\_\_ No\_\_\_\_ (***Bring details***) |

|  |  |
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| **CHILD CARE EXPENSES** | **OTHER MISCELLANEOUS EXPENSES** |
| *Name, Addresses and ID #’s of provider(s)*  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Amount paid………………………………… $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Do you have a dependent care benefit plan at work?  Yes\_\_\_\_ No\_\_\_\_ | Gambling losses………………………….. $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Impairment related work expenses…$\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |

|  |  |
| --- | --- |
| **MEDICAL EXPENSES** | **TAXES** |
| Insurance & Medicare (not pretax) …….. $\_\_\_\_\_\_\_\_\_\_\_\_\_  Long Term Care Insurance………………….. $\_\_\_\_\_\_\_\_\_\_\_\_\_  Prescriptions………………………………………. $\_\_\_\_\_\_\_\_\_\_\_\_\_  Eyeglasses, Hearing Aids & Batteries….. $\_\_\_\_\_\_\_\_\_\_\_\_\_  Doctors………………………………………………. $\_\_\_\_\_\_\_\_\_\_\_\_\_  Dentists……………………………………………. $\_\_\_\_\_\_\_\_\_\_\_\_\_  Hospital/Ambulance…………………………… $\_\_\_\_\_\_\_\_\_\_\_\_\_  Auto Mileage……………………………………… \_\_\_\_\_\_\_\_\_\_miles  Other Medical Expenses, Travel………… $\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Reimbursement……………………………….. $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  DID YOU RECEIVE REIMBURSMENTS AT WORK?  Yes\_\_\_\_ No\_\_\_\_ | Real Estate Taxes…………………………………. $\_\_\_\_\_\_\_\_\_\_\_\_\_  State Taxes paid in 21’ for 20’ or earlier $\_\_\_\_\_\_\_\_\_\_\_\_\_  State Taxes paid on Vehicles, Boats, Planes…$\_\_\_\_\_\_\_\_\_\_  Sales Tax Paid (from receipts)……………… $\_\_\_\_\_\_\_\_\_\_\_\_\_  ***2021 STATE TAX ESTIMATES***  Date paid \_\_\_\_\_\_\_\_\_\_\_\_\_\_ $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Date paid \_\_\_\_\_\_\_\_\_\_\_\_\_\_ $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Date paid \_\_\_\_\_\_\_\_\_\_\_\_\_\_ $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Date paid \_\_\_\_\_\_\_\_\_\_\_\_\_\_ $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  ***2021 FEDERAL TAX ESTIMATES***  Date paid \_\_\_\_\_\_\_\_\_\_\_\_\_\_ $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Date paid \_\_\_\_\_\_\_\_\_\_\_\_\_\_ $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Date paid \_\_\_\_\_\_\_\_\_\_\_\_\_\_ $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Date paid \_\_\_\_\_\_\_\_\_\_\_\_\_\_ $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  ***VEHICLE LICENSE TABS, PERS. PROP. TAX***…… $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |

**Schedule C Worksheet Profit or Loss from Business Vanderzee Financial**

This business is owned by the: Taxpayer \_\_\_ Spouse \_\_\_\_

Principal business or profession activity, including product or service. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Business name. If no separate business name, leave blank. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Employer ID number (EIN) \_\_\_\_-\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Business address:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Accounting method**;** Cash \_\_\_\_\_\_\_ Accrual \_\_\_\_\_\_\_\_

Did you start or acquired this business this year? Yes / No

Did you make any payments in 2020 that would require you to file Form(s) 1099? Yes / No

Is the business an **LLC**? Yes / No

**Income**

- Gross receipts or sales $\_\_\_\_\_\_\_\_\_\_\_\_\_\_

If this income was reported to you on Form W2 and the "Statutory employee" box on that form was checked, check here \_\_\_

- Other income, including Federal and state gasoline or fuel tax credit or refund $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Expenses**

- Advertising $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

- Car and/or truck Business Miles \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

- Commissions and fees $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

- Contract labor $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

- Cost of goods sold (Cost of direct expenses relating to inventory only)

Inventory at the beginning of the year (Should be same as prior year end-of-year total) $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Purchases less cost of items withdrawn for personal use $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Cost of labor. Do not include any amounts paid to yourself $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Materials and Supplies $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Other costs $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Inventory at the end of the year $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

- Depletion (expense of extracting natural resources from the earth) $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

- Depreciation and section 179 expense deduction (Vehicles, Machinery, Equip.) (List on back for additional items)

Description of Depreciation \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date placed in service \_\_\_\_\_\_\_/\_\_\_\_\_\_\_/\_\_\_\_\_\_\_\_

If real estate, is it residential rental? Yes \_\_\_\_\_\_ No \_\_\_\_\_\_

Cost Basis $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

- Employee benefit programs (other than pension and profit-sharing plans) $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

- Insurance, other than health $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

- Interest

Mortgage paid to banks, etc. $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Other $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

- Legal and professional services $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

- Office expense $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

- Pension and profit-sharing plans $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

- Rent or lease

Vehicles, machinery, and equipment $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Other business property $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

- Repairs and maintenance $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

- Supplies (not included in Cost of Goods) $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

- Taxes and licenses $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

- Travel $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

- Meals $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

- Utilities $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

- Wages $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

*\* Is your primary place of business in your home? If yes, bring all home related expenses, total square footage and square footage of space that is exclusively and regularly used for business.*

- Other expenses

Cell Phone $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Internet $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

(write in)\_\_\_\_\_\_\_\_\_\_\_\_\_\_ $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_$\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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**\_\_\_\_\_\_\_\_\_\_\_\_\_\_**$\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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**Schedule F Farm Income and Expenses Vanderzee Financial**

- Principal crop or activity\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

- Employer ID (EIN)\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

- Accounting method: Cash\_\_\_\_\_ Accrual\_\_\_\_\_

- Did you make any payments in 2020 that would require you to file Form(s) 1099? Yes / No

**Income**

- Sales of livestock and other resale items $\_\_\_\_\_\_\_\_\_\_\_\_\_

- Cost or other basis of livestock and other items reported above $\_\_\_\_\_\_\_\_\_\_\_\_\_

- Sales of livestock, produce, grains, and other products you raised $\_\_\_\_\_\_\_\_\_\_\_\_\_

- Cooperative distributions (Form 1099-PATR) $\_\_\_\_\_\_\_\_\_\_\_\_

- Taxable amount $\_\_\_\_\_\_\_\_\_\_\_\_

- Agricultural program payments $\_\_\_\_\_\_\_\_\_\_\_\_

- Taxable amount $\_\_\_\_\_\_\_\_\_\_\_\_

- Commodity Credit Corporation (CCC) loans reported under election $\_\_\_\_\_\_\_\_\_\_\_\_\_

- CCC Loans forfeited $\_\_\_\_\_\_\_\_\_\_\_\_

- Taxable amount $\_\_\_\_\_\_\_\_\_\_\_\_

- Crop Insurance proceeds and Federal crop disaster payments $\_\_\_\_\_\_\_\_\_\_\_\_

- Taxable amount $\_\_\_\_\_\_\_\_\_\_\_\_

- If election to defer to next year is attached, check here

- Amount deferred from last year $\_\_\_\_\_\_\_\_\_\_\_\_

- Custom hire (machine work) income $\_\_\_\_\_\_\_\_\_\_\_\_

- Other income $\_\_\_\_\_\_\_\_\_\_\_\_\_

**Expenses**

- Car and truck expenses $\_\_\_\_\_\_\_\_\_\_\_\_

- Chemicals $\_\_\_\_\_\_\_\_\_\_\_

- Conservation expenses $\_\_\_\_\_\_\_\_\_\_\_

- Custom hire (machine work) $\_\_\_\_\_\_\_\_\_\_\_

- Depreciation and section 179 expense deduction (Vehicles, Machinery, Equip.) (List on back for additional items)

- Description of Depreciation \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

- Date placed in service \_\_\_\_\_\_\_/\_\_\_\_\_\_\_/\_\_\_\_\_\_\_\_

- Cost basis $\_\_\_\_\_\_\_\_\_\_\_\_

- Employee benefit programs (other than pension or profit-sharing plans) $\_\_\_\_\_\_\_\_\_\_\_\_

- Feed $\_\_\_\_\_\_\_\_\_\_\_\_

- Fertilizers and lime $\_\_\_\_\_\_\_\_\_\_\_\_

- Freight and trucking $\_\_\_\_\_\_\_\_\_\_\_\_

- Gasoline, fuel, oil $\_\_\_\_\_\_\_\_\_\_\_\_

- Insurance (other than health) $\_\_\_\_\_\_\_\_\_\_\_\_

- Interest

- Mortgage (paid to banks, etc.) $\_\_\_\_\_\_\_\_\_\_\_\_ Other $\_\_\_\_\_\_\_\_\_\_\_\_

- Labor Hired $\_\_\_\_\_\_\_\_\_\_\_\_ Less employment credits $\_\_\_\_\_\_\_\_\_\_\_\_

- Pension and profit-sharing plans $\_\_\_\_\_\_\_\_\_\_\_\_

- Rent or lease

- Vehicles, Machinery, Equipment $\_\_\_\_\_\_\_\_\_\_\_\_

- Other (land, animals, etc.) $\_\_\_\_\_\_\_\_\_\_\_\_

- Repairs and maintenance $\_\_\_\_\_\_\_\_\_\_\_\_

- Seeds and plants $\_\_\_\_\_\_\_\_\_\_\_\_

- Storage and warehousing $\_\_\_\_\_\_\_\_\_\_\_\_

- Supplies $\_\_\_\_\_\_\_\_\_\_\_\_

- Taxes $\_\_\_\_\_\_\_\_\_\_\_\_

- Utilities $\_\_\_\_\_\_\_\_\_\_\_\_

- Veterinary, breeding, and medicine $\_\_\_\_\_\_\_\_\_\_\_\_

- Other expenses

Cell Phone $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Internet $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

(write in)\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_$\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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**Schedule E Rental Real Estate Profit and Loss Vanderzee Financial**

**Rental Information**

Rental address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date Placed in service \_\_\_\_\_\_/\_\_\_\_\_\_/\_\_\_\_\_\_

Is it residential rental? Yes \_\_\_\_\_ No \_\_\_\_\_

Purchase Price: $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Type of property: \_\_\_\_ Single family residence

\_\_\_\_ Multi-family residence

\_\_\_\_ Vacation or short-term rental

\_\_\_\_ Commercial

\_\_\_\_ Land

**Income**

**-** Rental days \_\_\_\_\_\_ Personal use days \_\_\_\_\_\_

- Gross Receipts $\_\_\_\_\_\_\_\_\_\_\_

- Income from 1099-NEC $\_\_\_\_\_\_\_\_\_\_\_

**Expenses**

- Advertising $\_\_\_\_\_\_\_\_\_\_\_

- Auto and travel $\_\_\_\_\_\_\_\_\_\_\_

- Cleaning and maintenance $\_\_\_\_\_\_\_\_\_\_\_

- Commissions $\_\_\_\_\_\_\_\_\_\_\_

- Insurance $\_\_\_\_\_\_\_\_\_\_\_

- Legal and professional $\_\_\_\_\_\_\_\_\_\_\_

- Management fees $\_\_\_\_\_\_\_\_\_\_\_

- Mortgage interest from Form 1098 $\_\_\_\_\_\_\_\_\_\_\_

- Other interest $\_\_\_\_\_\_\_\_\_\_\_

- Repairs $\_\_\_\_\_\_\_\_\_\_\_

- Supplies $\_\_\_\_\_\_\_\_\_\_\_

- Real estate tax $\_\_\_\_\_\_\_\_\_\_\_

- Taxes other than real estate $\_\_\_\_\_\_\_\_\_\_\_

- Utilities $\_\_\_\_\_\_\_\_\_\_\_

- Depreciation and section 179 expense deduction (**Vehicles, Machinery, Equip**.) (List on back for additional items)

- Description of Vehicle, Machinery or Equipment \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

- Date placed in service \_\_\_\_\_\_\_/\_\_\_\_\_\_\_/\_\_\_\_\_\_\_\_

- Cost basis $\_\_\_\_\_\_\_\_\_\_\_\_

- Other expenses $\_\_\_\_\_\_\_\_\_\_\_\_\_