

# What You Need For Your 2022 Tax Preparation

## What you should know:

1. Your tax return **will NOT** be filed until you have paid for services. Payment for services cannot be taken from your refund.
2. Your tax return **will NOT** be filed until you have signed the return.
3. Both spouses **must sign** the return before we can electronically file your return.

## What you should bring:

### Did you:

### If so, you need:

- |   |   |  |
|---|---|--|
| Sell any Crypto Currency?   | - | Bring your statement of purchase and sales for 2021.   |
| Renew your driver's license in 2022 or 2023?  | - | Provide a valid copy of your driver license (and your spouse - if applicable) for our file.                    |
| Make any energy efficient purchases to your home (windows, doors, insulation, heating/cooling, etc.)? | - | A receipt is best but it is not required. Note: A receipt will be required if you get audited.                 |
| Have a child in 2022?   | - | Bring a copy of your child's social security card  |
| Move or get a new phone number?   | - | Let us know when you come for your appointment or drop off your tax information.                               |
| Start or contribute to an HSA through your employer?  | - | The HSA information we need is stated on your W-2  |
| Start or contribute to an HSA that is not through your employer?                                      | - | Form 5498 or the amount you contributed during 2021.   |
| Have medical expenses that you paid with your HSA?  | - | Form 1099 SA   |
| Pay college tuition?  | - | Form 1098  |
| Make any charitable cash contributions (even if you don't itemize)?                                   | - | A receipt is best but it is not required. Note: You would be required to provide a receipt if you get audited. |
| Want your refund direct deposit?  | - | Provide us with your routing number and checking account number.   |
| Work for Shipt, Grub Hub, Uber or something similar?  | - | 1099 and expenses related to the work  |
| Receive unemployment?   | - | 1099 G   |

Note: If you own rental properties or a business, additional items will be required  
More information available on the 2022 Individual Taxpayer Organizer