Date of birth (m/d/y) Date of death (m/d/y) Date of birth (m/d/y) Date of death (m/d/y) Date	2022	1040	US	Client Information		1
Tulsa OK 74135 Telephone number: (918) 743-8181 Fax number: (918) 743-9142 E-mail address: 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 (table) 1-married filing separate and lived with spouse year spouse died, if qualifying surviving spouse (2020 or 2021) First name and initial. Last name. Titlessuffix. Social security number. Occupation. Date of birth (m/dy). Date of death (m/d/y). 1-blind. First name and initial. Last name. Title/suffix. Social security number. Occupation. Date of birth (m/dy). Date of death (m/d/y). 1-blind. First name and initial. Last name. Title/suffix. Social security number. Occupation. Date of birth (m/dy). Date of death (m/d/y). 1-blind. In care of Street address. Apartment number. City State Tip code. Foreign Region.				ociates, P.C.	Tax Return Ap	pointment
Filing Status (table)		Tulsa O Telepho Fax nur	K 74135 one numbe mber:		Time:	
Filing Status (table)		This of y	tax organiz our 2022 ta	zer will assist you in gathering inform ax return. Please add, change, or del	ation necessary for the ete information as appr	preparation opriate.
Filing 1 = married filing separate and lived with spouse	CLIEN	IT INFOR	RMATION			
First name and initial Last name Title/suffix Social security number Occupation Date of birth (m/d/y) 1=blind First name and initial Last name Title/suffix Social security number Occupation Date of death (m/d/y) 1=blind First name and initial Last name Title/suffix Social security number Occupation Date of death (m/d/y) 1=blind In care of Street address Apartment number City State ZiP code Region.	Filing Status	1=married Year spous	filing separate se died, if qua	and lived with spouse		Filling Status
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 In care of Street address Apartment number City State ZIP code Region Region Region Title Street address Region Region Title Title	Taxpayer	First name Last name Title/suffix. Social secu Occupation Date of bird Date of dea	and initial urity number th (m/d/y) ath (m/d/y)			1 = Single 2 = Married filing joint 3 = Married filing separate
Address In care of	Spouse	Last name Title/suffix. Social secu Occupation Date of birl Date of dea	urity number th (m/d/y)			
Foreign S	Address	In care of. Street addr Apartment City State	ressnumber			
Country	Foreign Address	Postal code	e			

OROGRA				I age 2
2022	1040	US	Client Information (continued)	1 p2

Please add, change or delete information for 2022.

CLIENT INFORMATION

	Home phone	
	Work phone	
Taxpayer	Work extension	
Contact Information	Daytime phone (table)	
mormation	Mobile phone	
	Fax number	
	E-mail address	
	Home phone	
	Work phone	
Spouse	Work extension	
Contact Information	Daytime phone (table)	
Taxpayer Authentication Spouse Authentication	Mobile phone	
	Fax number	
	E-mail address	
	Driver's license no	
	Driver's license state	
	Issue date (m/d/y)	
	Expiration date (m/d/y)	
	Theft protection PIN	
	Driver's license no	
	Driver's license state	
	Issue date (m/d/y)	
	Expiration date (m/d/y)	
	Theft protection PIN	

Daytime Phone

- 1 = Work 2 = Home 3 = Mobile

		i		 		_
2022	1040	US	Dependents	2)	

Please add, change or delete information for 2022.

DEPENDENTS

	Dependent	Dependent	
First name			
Last name			Type of Dependent
Title/suffix			1 = Child living w/taxpayer
Date of birth (m/d/y)			2 = Child not living w/taxpaver
Date of death			3 = Dependent other than child 4 = Head of household or
Date of adoption			qualifying surviving
Social security number			spouše (QSS) only. not a dependent
Relationship			5 = Earned income credit only,
Months lived at home			not a dependent
Type of dependent (see table)			
Earned income credit (see table)			Earned Income Credit
Claimed by: 1=taxpayer, 2=spouse			1 - When applicable (default)
IRS theft protection PIN			1 = When applicable (default) 2 = Student age 19 to 23
	Dependent	Dependent	3 = Disabled 4 = Force
First name			5 = Suppress
Last name			
Title/suffix			
Date of birth (m/d/y)			NOTE: If you claim the carned
Date of death			NOTE: If you claim the earned income credit, please provide
Date of adoption			proof that your child is a resident of the U.S. This proof is
Social security number			typically in the form of:
Relationship			School records or statement
Months lived at home			2. Landlord or property man-
Type of dependent (see table)			agement statement 3. Health care provider
Earned income credit (see table)			statement
Claimed by: 1=taxpayer, 2=spouse			4. Medical records
IRS theft protection PIN			5. Child care provider records6. Placement agency statement
İ	Dependent	Dependent	7. Social service records or statement
First name			8. Place of worship statement
Last name			9. Indian tribe office statement10. Employer statement
Title/suffix			10. Employer statement
Date of birth (m/d/y)			
Date of death			
Date of adoption			NOTE: If your child is disabled, please provide one of the fol-
Social security number			lowing forms of proof of disa-
Relationship			bility:
Months lived at home			1. Doctor statement 2. Other health care provider
Type of dependent (see table)			statement
Earned income credit (see table)			Social services agency or program statement
Larried income credit (see table)			program statement
Claimed by: 1=taxpayer, 2=spouse			

ORGANIZER				age 4							
2022	1040	US	Miscellaneous Questions								
	l£ a.a.										
	ir any	appr	owing items pertain to you or your spouse for 2022, please check the opriate box and provide additional information if necessary.								
YES	NO	PERSO	ONAL INFORMATION								
			Did your marital status change during the year?								
		Did your a	ddress change during the year?								
		Could you	Could you be claimed as a dependent on another person's tax return for 2022?								
		DEPEN	NDENTS								
		Were there	e any changes in dependents?								
		Were any older if stu	of your unmarried children who might be claimed as dependents 19 years of age or older (or 24 years udent) at the end of 2022?	or							
		Did you ha dividend ir	ave any children under age 19 or full-time students under age 24 at the end of 2022, with interest and noome in excess of \$1,100, or total investment income in excess of \$2,200?								
		HEALT	TH CARE COVERAGE								
		Did you re	ceive IRS document Form 1095-A (Health Insurance Marketplace Statement), If so, please attach.								
		INCOM	1E								
		Did you re	ceive unreported tip income of \$20 or more in any month?								
		Did you ca yourself, y	ash any Series EE U.S. savings bonds issued after 1989 and pay qualified higher education expenses your spouse, or your dependents?	for							
		Did you re	ceive any disability income?								
		Did you ha	ave any foreign income or pay any foreign taxes?								
		PURC	HASES, SALES AND DEBT								
			art a business or farm, purchase rental or royalty property, or acquire an interest in a partnership, tion, trust, or REMIC?								
			urchase or dispose of any business assets (furniture, equipment, vehicles, real estate, etc.), or conver assets to business use?	t any							
		Did you bu	uy or sell any stocks, bonds or other investment property in 2022?								
		Did you pu	urchase, sell, or refinance your principal home or second home, or did you take a home equity loan?								
		Did you made cell energy	ake any residential energy-efficient improvements or purchases involving solar, wind, geothermal or for sources?	uel							
		Did you ha	ave any debts cancelled or forgiven?								
		Does anyo	one owe you money which has become uncollectible?								

### BIT AND A STATES Did you want to allocate \$1 to her job you expect your 2022 estimated tax (instead of being refunded)? ### Po you want to allocate \$1 to the presidential Election Campaign Fund? ### Did you want to allocate \$1 to the Presidential Election Campaign Fund? ### Did you want to allocate \$1 to the Presidential Election Campaign Fund? ### Did you want to allocate \$1 to the Presidential Election Campaign Fund? ### Did you want to allocate \$1 to the Presidential Election Campaign Fund? ### Did you want to allocate \$1 to the Presidential Election Campaign Fund? ### Did you want to allocate \$1 to the Presidential Election Campaign Fund? ### Did you want to allocate \$1 to the Presidential Election Campaign Fund? ### Did you want to allocate \$1 to the Presidential Election Campaign Fund? ### Did you want to allocate \$1 to the Presidential Election Campaign Fund? ### Did you want to allocate \$1 to the Presidential Election Campaign Fund? ### Did you want to allocate \$1 to the Presidential Election Campaign Fund? ### Did you want to allocate \$1 to the Presidential Election Campaign Fund? ### Did you want to allocate \$1 to the Presidential Election Campaign Fund? #### Did you want to allocate \$1 to the Presidential Election Campaign Fund? #### Did you want to allocate \$1 to the Presidential Election Campaign Fund?	ORGANIZER			Page	5
PES 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 fultion expenses that are required to altend a college, university, or vocational school? ITEMIZED DEDUCTIONS 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)? 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 2021 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? Does you have an interest in or signature or other authority over a financial account in a foreign country, such as a bank Did you have an interest in or signature or other authority over a financial account in a foreign country, such as a bank Did you have an interest in or signature or other authority over a financial account in a foreign country, such as a bank Did you have an interest in or signature or other authority over a financial account in a foreign country, such as a bank Did you have an interest in or signature or other authority over a financial account in a foreign country.	2022	1040	US	Miscellaneous Questions (continued)	
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 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		If any	of the foll app	lowing items pertain to you or your spouse for 2022, please check the ropriate box and provide additional information if necessary.	
Did you transfer or rollover any amount from one retirement plan to another retirement plan?	YES	NO			
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? 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			Did you m	nake a contribution to a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.)?	
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 2021 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			Did you tr	ransfer or rollover any amount from one retirement plan to another retirement plan?	
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			Did you re	eceive a distribution from an Education Savings Account or a Qualified Tuition Program? your spouse, or a dependent incur any tuition expenses that are required to attend a college, university, or	
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					
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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			Did you u	se your car on the job (other than to and from work)?	
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			Did you a	apply an overpayment of 2021 taxes to your 2022 estimated tax (instead of being refunded)? We an overpayment of 2022 taxes, do you want the excess applied to your 2023 estimated tax (instead of being refunded)?	ing
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			,		J
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					
Did you have an interest in or signature or other authority over a financial account in a foreign country, such as a bank			Does you	r spouse want to allocate \$3 to the Presidential Election Campaign Fund?	
			May the II	RS discuss your tax return with your preparer?	
					nk

ORGANIZER Page 6 **Miscellaneous Questions (continued)** US 2022 1040 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. MISCELLANEOUS (continued) YES NO 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?

ORGANIZER

Direct Deposit & Estimates (Form 1040 ES) US 2022 1040 3, 6 Please enter all pertinent 2022 information. **DIRECT DEPOSIT / ELECTRONIC PAYMENT (3)** 1=direct deposit of federal tax refund into bank account **BANK INFORMATION** Percent to Type of Type of Deposit Account Invest. Name of Bank **Routing Number Account Number** $(x\dot{x}.xx)$ (Table 1) (Table 2) 2022 ESTIMATED TAX / 1040-ES (6) 2022 **Federal Amount Paid Date Paid** Voucher Amount Overpayment applied from 2021 3rd quarter payment... Additional Estimated Tax Payments Paid with extension Former spouse SSN if joint estimates 2022 State **Amount Paid Date Paid** Voucher Amount Overpayment applied from 2021 1st quarter payment 2nd quarter payment 3rd quarter payment 4th quarter payment Additional Estimated Tax Payments Paid with extension 2 1 Type of Account Type of Investment 1 = Checking or savings (default) 2 = Taxpayer's IRA (next year limits) 3 = Spouse's IRA (next year limits) 4 = Health savings account (HSA) 5 = Archer MSA 6 = Coverdell savings account (ESA) 7 = Other 8 = Taxpayer's IRA (current year limits) 9 = Spouse's IRA (current year limits) 1 = Savings 2 = Checking

ORGANIZER Page 8 Direct Deposit & Estimates (Form 1040 ES) (cont.) US 1040 7.1 2022 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? If "yes" explain any differences in income, deductions, dependents, etc.: Do you expect your 2023 withholding to be different from 2022? If "yes" explain any differences:

7.1

ORGANIZER

Wages, Pensions, Gambling Winnings 10, 13.1, 13.2 US 1040 2022

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.

		Name of Employer (Box c) 1=retirement plan (Box 13)	Wages, Tips, Other							
No.	Name of Employer (Box c)	plan (Box 1=spouse	Compensation Federal Security		Medicare (Box 6)	State (Box 17)	Local (Box 19)	2021 Wages		

PENSIONS, IRA DISTRIBUTIONS (13.1)

		Distri	butio	n cod	le #2	.	0	T	Tax W	ithheld	Value of	
No.	Name of Payer	Distribution code #1 1=IRA/SEP/SIMPLE 1=spouse			Gross Distribution (Box 1)	Taxable Amount (Box 2a)	Federal (Box 14)		Value of all IRAs at 12/31/22	2021 Distribution		
	<u> </u>							_	•			

GAMBLING WINNINGS (W-2G) (13.2)

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

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

(13.2)	2022 Amount	TS	2021 Amount
Total gambling losses			
Winnings not reported on Form W-2G			

10, 13.1, 13.2

2022 1040 US Interest & Dividend Income 11, 12

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

INTEREST INCOME (11)

	Name of Paver	1		Interest Income		Tax-Exem	pt Interest	Early Withdrawal	
No.	Name of Payer (also enter SSN & address for seller-financed mortgage)	1=taxpayer 2=spouse	Banks, S&Ls, C/Us, etc. (Box 1)	Seller- Financed Mtg. (Box 1)	U.S. Bonds, T-Bills (Box 3)	Total Municipal Bonds	In-state Municipal Bonds	Penalty (Box 2)	2021 Interest
	•		•		•				

DIVIDEND INCOME (12)

		1_taypayo	_	Di	vidend Incor	me		Tax-Exempt Interest Foreign			
No.	Name of Payer	2=spouse	Total Ordinary Dividends (Box 1a)	Qualified Dividends (Box 1b)	Total Capital Gain Distrib. (Box 2a)	SubSection 199A (Box 5)	U.S. Bonds (% or amt.)	Total Municipal Bonds	In-state Muni-bonds (% or amt.)	Foreign Tax Paid (Box 7)	2021 Dividends
	_										
		•	•								

2022 1040 US Miscellaneous Income 14.1

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 Am	ount	2021 Am	ount
	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:				
				
				
ther 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				

ORGANIZER Page 12

2022	1040	US	State & 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)

	711112111 33111 2113/111311 (1 31111 13/7 3)	2022 1099-G Amount
	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)	
No.	RTAA payments (Box 5)	
NO	I	
	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)	
	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)	
	r oddidi modino tax mamora (Box 1)	
No.		
No.	RTAA payments (Box 5) Taxable grants:	
No.	RTAA payments (Box 5)	
No.	RTAA payments (Box 5) Taxable grants: Federal taxable amount (Box 6)	
No.	RTAA payments (Box 5)	
No.	RTAA payments (Box 5) Taxable grants: Federal taxable amount (Box 6) State taxable amount, if different Farm amounts:	
No.	RTAA payments (Box 5) Taxable grants: Federal taxable amount (Box 6) State taxable amount, if different Farm amounts: Agriculture payments (Box 7)	
No.	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	
No.	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)	
No.	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	
No.	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)	

2022 1040 US Capital Gains & Losses (Schedule D)

17

If you sold any stocks, bonds, or other investment property in 2022, please list the pertinent information for each sale below or provide a spreadsheet file with this information. Be sure to attach all 1099-B forms and brokerage statements.

No.	Quantity	Description of Property (Box 1a)	Date Acquired (Box 1b)	Date Sold (Box 1c)	Sales Price (gross or net) (Box 1d)	Cost or Basis (Box 1e)	Blank=basis rep. to IRS, 1=nonrec. security (Box 3, 5)	Expenses of Sale (if gross sales price entered)	Federal Incom Tax Withheld (Box 4)
						_			
									17

RUANIZER				rage 14
2022	1040	US	Adjustments to Income	24

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

TRADITIONAL IRA CONTRIBUTION	S Taxpayer	mount Spouse	2021 Am Taxpayer	Spouse
IDA	Taxpayer	Spouse	Тахрауеі	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			1	
2022 payments from 1/1/23 to 4/15/23				
ROTH IRA CONTRIBUTIONS				
Г			1	
Roth IRA contributions you made or expect to make (1=maximum) (\$6,000/\$7,000 if 50 or older)				
Contributions made to date				
	NO (((EOOL))			
SEP, SIMPLE AND QUALIFIED PLA	NS (KEOGH)			
Profit-sharing (25%/1.25) contributions you made or expect to make (1=maximum)				
F			┨	
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)			+	
ndividual 401k: SE elective deferrals (except Roth) (1=max.)				
ndividual 401k: SE designated Roth contributions (1=max.)				
SIMPLE contributions:				
Г				
Self-employed SIMPLE contributions you made or expect to make (1=maximum)				
Employer matching rate if not .03 (.xxxx)				
4 1 1 1 1 1 (00()			1	
Contributions made to date				
ADJUSTMENTS TO INCOME				
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:				
Alimony paid: Taxpayer		Spouse		
of divorce or sep. agreement		Spouse		
Recipient's first name				
Recipient's last name				
Recipient's SSN				
	2021		0004	
Amount paid	2021 amt:		2021 amt:	

2022 1040 US Itemized Deductions 25

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

MEDICAL AND DENTAL EXPENSES

Medicare insurance premiums on Sheet 14.	2022 Amount	TS	2021 Amount
rescription medicines and drugs			
octors, dentists and nurses			
ospitals and nursing homes			
surance premiums not entered elsewhere (excl. LT care & amts. paid w/pre-tax dollars)			
ong-term care premiums - taxpayer			
ong-term care premiums - spouse			
surance reimbursement (enter as a positive number)			
odging and transportation:			
Out-of-pocket expenses			
Medical miles driven (1/1/22 - 6/30/22)			
Medical miles driven (7/1/22 - 12/31/22)			
ther medical and dental expenses:			
		1 1	
AXES PAID (State and local withholding and 2022 estimates are auto	omatic.)		
tate income taxes - 1/22 payment on 2021 state estimate			
tate income taxes - paid with 2021 state return extension			
tate income taxes - paid with 2021 state return			
tate income taxes - paid for prior years and/or to other state			
ity/local income taxes - 1/22 payment on 2021 city/local estimate			
ity/local income taxes - paid with 2021 city/local extension			
ity/local income taxes - paid with 2021 city/local return			
ALES AND USE TAXES PAID		· ·	
		<u> </u>	
tate and local sales taxes (except autos and special items)			
se taxes paid on 2022 purchases			
se taxes paid with 2021 state return			
ales tax on autos not included above			
ales tax on boats, aircraft, other special items			
OTHER TAXES PAID			
eal estate taxes - principal residence:			
eal estate taxes - held for investment :			
Constitution in the investment.			
		 	
			
properly toyon (including outs food in correctators Decides a serve of toy out to			
ersonal property taxes (including auto fees in some states. Provide a copy of tax notice)			
preign income taxes			
ther taxes:			

22	1040	US	Itemized Deductions (c	ontinuea)		25
	Dlassa an	tar all nart	tinent 2022 amounts. Last year's a	mounts are provide	d for you	ur reference
		-	illieni 2022 amounts. Last years a	illiounts are provided	u ioi yo	ui reference.
	EREST PA		malata (Day 2) manastad ay Fama 1000			
Home	e mortgage int.	(Box 1) and	points (Box 2) reported on Form 1098:	2022 Amount	TS	2021 Amount
	Home mortgad	ge interest no	ot reported on Form 1098:			
	Payee's name	<u> </u>				
	Payee's SSN of Payee's street	—				
	Payee's city	<u> </u>				
	Payee's state.	_				
	Payee's ZIP or Payee's region	-				
	Payee's posta	I code				
	Payee's count	_				
Point	s not reported					
Morto	age insurance	premiums o	n post 12/31/06 contracts (Box 4)			
_	, ,	•	margin accounts):			
Pass	ive interest					
NOT	E: Points paid	on loans oth	er than to buy, build, or improve your main h	ome are deductible over th	ne life of th	ne mortgage.
0.0			also provide the dates and lives of the loans			
	SH CONT			mar maintaine a hank rasa	rd or o war	ritton communication
NOT	from the dor	n is allowed nee, showing	for cash or check contributions unless the do the name of the organization, contribution d	ate(s), and contribution an	nount(s).	Titlen communication
Churc	ches, schools, l	nospitals, an	d other charitable organizations (60% limitati	on):		
С	Contributions by	cash or che	ck:			
			pocket)			
Ν	lumber of chari	table miles.				
Veter	ans' organizati	ons, fraterna	Il societies, nonprofit cemeteries, and certain	private nonoperating foun	dations (3	0% limitation):
С	Contributions by	cash or che	ck:			
			-			
					+	
٧	/olunteer exper	ses (out-of-r	pocket)			
	•					

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e. ehold items denied. ount
ount

ORGANIZER Page 18

7077 1040 OS HEHIVEO DEGUCTOUS (COMMUNEO)	25 n4	1040 US Itemized Deductions (continued)	2022
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Please enter all pertinent 2022 amounts. Last year's amounts are provided for your reference.

THER MISCELLANEOUS DEDUCTIONS	2022 Amount	TS	2021 Amount
ate tax, section 691(c)			
er miscellaneous deductions:			
		1 1	

2022 1040 US Itemized Deductions (continued) 25 p5

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 .			
lome acquisition and grandfather debt on the date that the last debt was secured			
LOAN INFORMATION			
oan #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			
oan #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			
Form		1 1	
1 = Schedule A (defau 2 = Business use of h 3 = Schedule E			

25 p5

Itemized Deductions (continued) US $25_{\ p5\ cont}$ 2022 1040

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	2022 Amount	TS	2021 Amount
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			
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			<u> </u>
Grandfather deht halance - heginning of year			

Form

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

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2022 1040 US Noncash Contributions (Form 8283)

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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.

	Name of ch	aritable organization (donee)			
		ess			
	,				
		?=joint			
	· ·	scription (other than vehicle)			
	Froperty de	Identification number (VIN)			
No.	\neg $ $	Year (yyyy)			
	→ Vehicle	Make and model			
		Condition and mileage			
	Date of cont	ribution (m/d/y)			
		ed by donor (m/y)			
		ed by donor (Table 1 or describe)			
		t or basis			
		value			
		d to determine FMV (Table 2 or des			
	Wether use	a to determine him (rable 2 or des	31100)		
	Name of cha	ritable organization (donee)			
		SS			
	1 3				
		=joint			
		cription (other than vehicle)			
	Droporty doc	chonon (omer man venicle)			
	Property des	7			
No	Property des	Identification number (VIN)			
No.	Property des Vehicle	Identification number (VIN) Year (yyyy)			
No.	7	Identification number (VIN) Year (yyyy) Make and model			
No.	Vehicle	Identification number (VIN) Year (yyyy) Make and model Condition and mileage			
No.	Vehicle Date of contri	Identification number (VIN) Year (yyyy) Make and model Condition and mileage ribution (m/d/y)			
No.	Vehicle Date of contribute acquire	Identification number (VIN) Year (yyyy) Make and model Condition and mileage ribution (m/d/y) d by donor (m/y)			
No.	Vehicle Date of control Date acquire How acquire	Identification number (VIN) Year (yyyy) Make and model Condition and mileage ribution (m/d/y) d by donor (m/y) d by donor (Table 1 or describe)			
No.	Date of contr Date acquire How acquire Donor's cost	Identification number (VIN) Year (yyyy) Make and model Condition and mileage ribution (m/d/y) d by donor (m/y) d by donor (Table 1 or describe) or basis			
No.	Date of contr Date acquire How acquire Donor's cost Fair market	Identification number (VIN) Year (yyyy) Make and model Condition and mileage ribution (m/d/y) d by donor (m/y) d by donor (Table 1 or describe) or basis			
No.	Date of contr Date acquire How acquire Donor's cost Fair market	Identification number (VIN) Year (yyyy) Make and model Condition and mileage ribution (m/d/y) d by donor (m/y) d by donor (Table 1 or describe) or basis			
No.	Date of contr Date acquire How acquire Donor's cost Fair market	Identification number (VIN) Year (yyyy) Make and model Condition and mileage ribution (m/d/y) d by donor (m/y) d by donor (Table 1 or describe) or basis			
	Date of contr Date acquire How acquire Donor's cost Fair market Method used	Identification number (VIN) Year (yyyy) Make and model Condition and mileage ribution (m/d/y) d by donor (m/y) d by donor (Table 1 or describe) or basis value I to determine FMV (Table 2 or descril	De)		
No.	Date of contr Date acquire How acquire Donor's cost Fair market Method used	Identification number (VIN) Year (yyyy) Make and model Condition and mileage ribution (m/d/y) d by donor (m/y) d by donor (Table 1 or describe) or basis value I to determine FMV (Table 2 or describe) sperty was Acquired	De)	Method Used to De	
	Vehicle Date of control Date acquirer How acquirer Donor's cost Fair market of Method used How Product 1 = Purchase	Identification number (VIN) Year (yyyy) Make and model Condition and mileage ribution (m/d/y) d by donor (m/y) d by donor (Table 1 or describe) or basis value It to determine FMV (Table 2 or describe) sperty was Acquired 3 = Inheritance	2 1 = Appra	aisal	3 = Catalog
No.	Vehicle Date of control Date acquire How acquire Donor's cost Fair market Method used	Identification number (VIN) Year (yyyy) Make and model Condition and mileage ribution (m/d/y) d by donor (m/y) d by donor (Table 1 or describe) or basis value I to determine FMV (Table 2 or describe) sperty was Acquired	2 1 = Appra		