

2022 Income Tax Questionnaire

1. Did you make any charitable gifts in 2022? If so, to whom and for how much?
2. Did you make a qualified charitable deduction from an IRA in 2022? If so, from which account, how much, and to what charity? Was it directly distributed to the charity from the IRA?
3. Did you pay Long Term Care insurance premiums in 2022? If so, how much?
4. Did you make quarterly estimated tax payments in 2022 or January 2023 for tax year 2022? If so, is evidence of these payments included with your tax information?
5. Did you receive a notice form the IRS regarding your 2021 income tax return? If so, please include notice with your tax information.
6. Did you buy or sell cryptocurrencies in 2022? If so, please include evidence of the purchases and sales with your tax documents?
7. Did you receive payments via Venmo, Paypal or other payment processors for the sale of goods or services? If so, how much? Are these payments included with your other business income, if any? Did you receive form 1099K?
8. Do you have a Shared Custody Arrangement due to Divorce? If so, who claims the child(ren) based on the Divorce Decree?
9. Did you pay for Child Care in 2022? If so, how much and to whom?
10. Did you purchase Health Insurance through Healthcare.gov? If so, is payment information included?
11. Did you make a contribution to an IRA in 2022?
12. Did you adopt a child in 2022? If so, when?
13. Did you install a qualifying electric system that uses solar, wind, geothermal or fuel cell power? If so, please provide receipts for qualified purchases.
14. Did you purchase an Electric Vehicle prior to 8/16/22? After 8/16/22? If so, please provide purchase information.
15. Did you use US Savings Bonds to fund higher education expenses? If so, please provide details.
16. Were you the victim of officially declared natural disaster (ie., Hurricane Ian)?
17. Please confirm bank routing number and account number for direct deposit of refunds.

Email: pskaff@perrysburglaw.com