

BUTLER ACCOUNTING & TAXES INC.
2022 CHECKLIST FOR INCOME TAXES & DEDUCTIONS

W2'S

1099-INT INTEREST EARNED ON SAVINGS, CD'S, MONEY MARKETS

1099-DIV DIVIDENDS EARNED

1099-B STOCK SALES SOLD IN 2022/ COST BASIS ON STOCKS SOLD

1099- MISC (IF ANY) -SELF EMPLOYMENT/ OUTSIDE CONTRACTOR

1099-C CANCELLATION OF DEBT/ FORECLOSURES/ CREDIT CARD CANCELLED DEBT

1099-R/SSA-1099 RETIREMENT DISTRIBUTIONS (IRA'S, PENSION, SOCIAL SECURITY)

1099-G UNEMPLOYMENT AND STATE TAX REFUND RECEIVED IN 2022

W2-G GAMBLING WINNINGS / LOTTERY /PRIZES/AWARDS/ROYALTIES

RENTAL INCOME AND DEDUCTIONS (INVESTMENT PROPERTY)

1099-R IRA OR ROTH, 401K DISTRIBUTIONS, RETIREMENT DISTRIBUTIONS

SELF EMPLOYED SEP RETIREMENT CONTRIBUTIONS

1098-E STUDENT LOAN INTEREST PAID IN 2022

NEW VEHICLE PURCHASE OR BOATS, PLANES, RVS, BIG TICKET ITEMS

SALES TAX ON HOME BUILDING MATERIALS

APPLIANCES PURCHASED/ WINDOWS / FURNACE/AC

MORTGAGE INTEREST PAID (ALSO PMI INSURANCE ON THE LOAN)

REAL ESTATE TAXES PAID / PERSONAL PROPERTY TAX

CLOSING OR SETTLEMENT STATEMENTS FOR OLD/NEW HOMES

MORTGAGE INSURANCE PREMIUMS ON CLOSING STATEMENT/MONTHLY

CASH & MISC DONATIONS (CLOTHING, GOODS TO GOODWILL)

CHURCH DONATIONS AND OTHER MISC CHARITIES/ SILENT AUCTIONS

FUND-RAISERS, GIRL/BOY SCOUTS, MARKET DAY, SCHOOL FUN FAIR, BOOK FAIR

VOLUNTEER WORK EXPENSES PLUS COACHING OR MENTORING

ANY INVOLVEMENT WITH HURRICANE RELIEF OR MIDWEST TORNADOES, FLOODS, FIRES

DAY CARE OR ELDERLY CARE EXPENSES / ADULT DAY CARE

MEDICAL & DENTAL EXPENSES, COUNSELING, STOP SMOKING, RX, ORTHO, BACK DR

EDUCATION FOR KIDS OR SELF, SPOUSE/ ELEMENTARY TO COLLEGE

529 COLLEGE PLANS CONTRIBUTIONS AND OR DISTRIBTUIONS

Income Tax Organizer

Name _____ Year _____

Basic Information

	First, Initial, Last Name	Social Security No.	Date of Birth	Occupation	Deceased
Taxpayer					
Spouse					
Address				Home Phone	
City, State, Zip				Cell Phone	
Email Address				Work Phone	

Filing Status ___ Single ___ Married filing joint ___ Head of Household ___ Widowed ___ Married/separate

	First, Initial, Last Name	Social Security No.	Date of Birth	Relationship	Months in Home
Dependents					

Miscellaneous income

State tax refund	
Unemployment	
Social Security:	
Taxpayer	
Spouse	
Gambling winnings	
Alimony received	
Prizes/awards	
Hobby income	
Taxable scholarships (Pell grant)	
Jury duty fees	
Other:	

Miscellaneous deductions

	Spouse
Traditional IRA contribution	
SEP/SIMPLE/Keogh contribution	
Student loan interest paid	
Classroom expenses by teacher	
Adoption expenses	
Early withdrawal of savings	
Moving expenses	
Self-employed health insurance	
Alimony paid	
Other:	

K-1's (Partnerships/S-Corps/Trusts)

Name	Income

Estimated tax payments made

	Federal	State
1st Quarter		
2nd Quarter		
3rd Quarter		
4th Quarter		
Applied/Last Yr.		

Education Expenses

Student	Type of education*	Tuition	Books	Room & Board

*K-12, trade school, undergraduate college, postgraduate college, job-related education, leisure course

Child Care Expenses

Paid To	Address	Soc. Sec. or Tax ID #	Amount	Child's Name

Business Use of Vehicle

	Vehicle 1	Vehicle 2
Year, make & model		
Date first used for business		
Cost (including sales tax)		
End of year odometer reading		
Beginning of year odo reading		
Total miles driven during year		
Business miles		
Daily miles to & from work		
Total annual commuting miles		
Gasoline		
Maintenance/oil changes		
Tires		
Repairs		
Registration/license fee		
Auto Insurance		
Is another vehicle available for personal use?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Do you have evidence to support your mileage use?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Is your evidence written? (Log, calendar, etc.)	<input type="checkbox"/> Yes	<input type="checkbox"/> No

Business Use of Home

Is use for:	
<input type="checkbox"/> Office in home REQUIRED by employer	
<input type="checkbox"/> Day care facility	
<input type="checkbox"/> Home-based business	
Square feet used EXCLUSIVELY REGULARLY for business	
Total square feet in home	
Expenses (record totals; don't prorate)	
Mortgage interest	
2 nd mortgage interest	
Property taxes	
Homeowner's insurance	
Homeowner association	
Electricity	
Gas	
Water & sewer	
Trash pickup	
Fire protection	
Security/alarm service	
Pest control service	

Business Income & Expenses

Business Name _____

Gross sales/receipts _____

Business Address _____

Inventory

Beginning of year	
End of year	
Cost of merchandise bought	
Materials & Supplies	
Production labor	

Equipment bought

Description	Cost	Date

Vehicle Use

	Vehicle 1	Vehicle 2
Year, make & model		
Date first used for business		
Cost (including sales tax)		
End of year odometer reading		
Beginning of year odo reading		
Total miles driven during year		
Business miles		
Daily miles to & from work		
Commuting to/from work miles		
Gasoline		
Maintenance/oil changes		
Tires		
Repairs		
Registration/license fee		
Auto Insurance		

Operating Expenses:

Advertising/promotion	
Commissions	
Insurance – liability	
Interest paid	
Legal/prof. services	
Office supplies	
Other supplies	
Office rent	
Equipment rent	
Vehicle rent/lease	
Repairs & maintenance	
Taxes & licenses	
Travel/airfare/lodgings	
Meals & entertainment	
Utilities	
Wages to employees	
Bank charges	
Telephone/cellular	
Internet access	
Printing/coping	
Postage/mailing	
Delivery/shipping	
Contracted services	
Membership fees & dues	
Publications & subscriptions	

Is another vehicle available for personal use? Yes No

Do you have evidence to support your mileage use? Yes No

Is your evidence written? (Log, calendar, etc.) Yes No

