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 DISTRIBUTIONS

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	SingleMarried	iling jointHead o	of Household	Widowed	_Married/separate
	First, Initial, Last Name	Social Security No.	Date of Birth	Relationship	Months in Home
Dependents					

Miscellaneous income		Miscellaneous deductions	Spouse
State tax refund		Traditional IRA contribution	
Unemployment		SEP/SIMPLE/Keogh contribution	
Social Security: Taxpayer		Student loan interest paid	
Spouse		Classroom expenses by teacher	
Gambling winnings		Adoption expenses	
Alimony received		Early withdrawal of savings	
Prizes/awards		Moving expenses	
Hobby income		Self-employed health insurance	
Taxable scholarships (Pell grant)		Alimony paid	
Jury duty fees		Other:	
Other:			
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Estimated tax payments made

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

Name	Income

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

Federal	State
	Federal

Income

Wages/Salaries

Employer	Wages	Federal Withholding	Illinois State Withholding	Other State Withholding	

Pensions/Retirement Fund Distributions

Payer

Total Distribution	Taxable Amount	Federal Withholding	State Withholding	Distrib. Code	Check if IRA

Interest Income

Paid By

Dividends Income

Paid By	Amount	Cap. Gains Dist.

Sales of Stocks, Securities & Other Capital Assets

Amount

Quantity & Description	Date Bought	Date Sold	Cost	Sale Price	Gain/Loss

Itemized Deductions

Home mortgage interest on Form 1098	
Home mortgage interest NOT on Form 1098	
Points paid (purchaserefinance)	
Real estate property taxes – home	
Real estate property taxes - investment	
Car registration fees	
State tax paid with last year's return	
Other taxes paid	
Interest paid on investments	
Investment expenses	
Safe deposit box rental	
Tax preparation fees	
Gambling losses (only if you also won)	

Medical doctors/office visits	
Dentist/dentures	
Chiropractors	
Hospitals	
Lab/clinic fees	
Prescription medications	
Eyeglasses/contact lenses	
Medical equipment/braces	
Ambulance service	
Medical insurance premiums	
Dental insurance premiums	
Long-term care premiums	

Contributions to Charity

Money (check or cash)	Amount	
Non-money (goods) donations		

Work-Related Expenses

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Professional/union dues	
Professional journals	
Work-related education	
Licenses/renewals	
Professional insurance	
Tools & equipment	
Uniforms/safety equipment	
Pay phone/long distance/cell	
Unreimbursed travel/airfare	
Unreimbursed lodgings	
Taxis/rental cars	
Unreimbursed meals	
Job-seeking expenses	
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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	☐ Yes	
for personal use?	🗆 No	
Do you have evidence to	🗌 Yes	
Support your mileage use?	🗌 No	
Is your evidence written?	☐ Yes	
(Log, calendar, etc.)	🗆 No	

Business Use of Home

Is use for:	employer
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 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		

Business Name_____ Gross sales/receipts _____

Operating Expenses:

Advertising/promotion Commissions Insurance – liability Interest paid Legal/prof. services Office supplies Other supplies Office rent Equipment rent	
Insurance – liability Interest paid Legal/prof. services Office supplies Other supplies Office rent	
Interest paid Legal/prof. services Office supplies Other supplies Office rent	
Legal/prof. services Office supplies Other supplies Office rent	
Office supplies Other supplies Office rent	
Other supplies Office rent	
Office rent	
Equipment rent	
Equipmont form	
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?	
Do you have evidence to	
Support your mileage use?	
Is your evidence written?	
(Log, calendar, etc.)	

Rental Properties

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Description	Cost	Date	Property

Purchase Price:	
Date Acquired	
Property B:	
Description:	
Address:	
Purchase Price:	
Date Acquired	
Property C:	
Description:	
Address:	
Purchase Price:	
Date Acquired	
Vehicle Use	
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	
Gasoline	
Maintenance/oil changes	
Tires	
Repairs	
Registration/license fee	
Auto Insurance	
Is another vehicle available	□ Yes
for personal use?	🗆 No
Do you have evidence to	🗌 Yes
Support your mileage use?	🗆 No
Is your evidence written?	🗌 Yes
(Log, calendar, etc.)	🗌 No