

Personal Residence:

- Y N Did you move in 2022?
- Y N Were you a full year Wisconsin resident? If no, what was other state of residency:* _____
Date moved to WI: _____ Date moved from WI: _____
- Y N Did you pay rent in 2022? Amount \$ _____/year
 Y N Was heat included?
- Y N Did you pay real estate taxes in 2022? If yes, attach tax bill and receipts.
- Y N Did you pay home mortgage interest in 2022? If yes, attach Form(s) 1098.
- Y N Did you pay home mortgage interest that was not reported to you on Form 1098? If yes, please provide:
Recipient's Name: _____ SSN: _____
Address: _____ City: _____ State: _____ Zip: _____
- Y N Did you refinance your mortgage in 2022?
- Y N Do you have a Home Equity Line of Credit?
If so, what was it used for? _____
- Y N Did you make any solar energy efficient improvements to your main home? If yes, please attach receipts.
- Y N Did you purchase a home in 2022? If yes, attach closing statements.
- Y N Did you sell a home in 2022? If yes, attach closing statements.
Date of sale: _____ Date this home was purchased: _____ Original purchase price: \$ _____
- Y N Was this home your primary residence for at least 2 of the last 5 years?
- Y N Did you ever rent out the property or use any portion of the home for business purposes?
- Y N Have either you or your spouse sold a principal residence within the last two years?
If yes, at the time of that sale, who owned the residence? Taxpayer Spouse Both

Federal and/or State Estimated Tax Payments:

- Y N Did you make any Federal or State estimated tax payments in 2022?

****Please verify with your bank records that indicated deposits were made****

Federal Payments		
Due Date	Date Paid	Amount
07/15/2022		\$
07/15/2022		\$
09/15/2022		\$
01/15/2023		\$

State Payments		
Due Date	Date Paid	Amount
07/15/2022		\$
07/15/2022		\$
09/15/2022		\$
01/15/2023		\$

- Y N If you have a refund, would you like the refund applied to next year's taxes?
- Y N If you have a balance due, would you like us to calculate 2022 estimated tax payments for you?
(If not answered, we will calculate estimates for you and charge accordingly.)

Refund(s):

If you would like your federal and/or state refund(s) direct deposited, please provide bank information below:

Name of financial institution: _____ Type of Account: Checking Savings

Routing # _____ Account # _____

Y N If you are married filing a joint return with your spouse, is this a joint bank account?

Client Questions: _____

CHECKLIST:

Please indicate which of the following documents you have included:

- W-2** Wages & Salaries from ALL employers
- 1099-R** Pensions, IRAs & Annuities
- 1099-SSA/RRB** Social Security & Railroad Retirement
- 1099-G** Unemployment Compensation
- Composite 1099** Statement from brokerage accounts
- 1099-B** Statement of securities sales
- 1099-INT** Interest received for ALL accounts
- 1099-DIV** Dividends received from ALL accounts
- 1099-MISC** Miscellaneous income
- 1099-A** Foreclosures/Abandonment
- 1099-C** Debt Cancellation
- 1099-SA** Health Savings Account statements
- W2-G** Gambling Winnings
- 1099-NEC** Non-Employee Compensation
- 1098** Mortgage interest statements
- Property tax bill for taxes paid in 2022
- Rent certificate(s) for WI homestead credit (income < \$24,680)
- Closing documents from purchase and/or sale of home
- 1098-E** Student loan interest
- 1098-T** College tuition statement(s)
- College expenses: Bursar's statement or receipt
- 1099-Q** Education savings account distribution
- EdVest/Tomorrow's Scholar year end statement
- Private school tuition statement (K-12 only)
- K-1** Partnerships, Trusts, Estates & S-Corps
- 1098-C** charitable donation of a car, boat, etc.
- 1095-A** Form for Marketplace health insurance)

Signatures:

I/we verify that the information provided in this document is true and correct to the best of my/our knowledge. I/we understand that any questions not answered will be assumed "no"

Taxpayer Date

Spouse Date