TAX RETURN QUESTIONNAIRE FOR TAX YEAR 2022

DUE TO IRS REQUIREMENTS THIS QUESTIONNAIRE MUST BE COMPLETED AND SUBMITTED WITH YOUR TAX INFORMATION IN ORDER FOR YOUR TAX RETURNS TO BE PREPARED

Baldwin Hills Tax Service

MAILING address to send back tax documents (if different from tax return)

TAX RETURN address. This address will appear on the tax return.

☐ Same as Last Year

CHECK BOX IF YOU ARE A NEW CLIENT ☐

☐ **DIRECT DEPOSIT** Check if you want a faster and more secure refund sent to your account. Provide us with a voided check or write info below. If the account info is not provided you will receive a paper check.

☐ Same as Last Year

☐ Voided Check Enclosed

Routing #:____

Account #:____

Type of account (Checking or Savings):____________________________

☐ **DIGITAL DOCUMENT STORAGE (DDS)**
Please check to have your 2022 tax records digitally stored. DDS is only available if you prepay your invoice.

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TAXPAYER		**SPOUSE**	
NAME	**Blind** ☐ **Disabled** ☐	**NAME**	**Blind** ☐ **Disabled** ☐
Social Security No.	**Date of Birth**	**Social Security No.**	**Date of Birth**
Occupation	If Law Enforcement, Indicate Agency	**Occupation**	If Law Enforcement, Indicate Agency
Home #	Cell #	Home #	Cell #
E-Mail		E-Mail	
School District		**County**	

FILING STATUS on 12/31/22

☐ MARRIED — If MARRIED & prefer to file **married filing separately** check box ☐

☐ SINGLE — If SINGLE & provided a home for another person check box ☐

HEAD OF HOUSEHOLD ☐

DEPENDENTS ☐ Check if you are a noncustodial parent claiming a child because the custodial parent released the exemption to you. **Provide us a signed Form 8332**.

Check If New	Name	Social Security #	Date of Birth	Relationship Daughter, Son, Mother, etc.	During 2021 No. of months lived in tax-payer's home	Dependent had income over $4300? Yes/No	Provided more than 1/2 of dependent support? Yes/No	Attends College? Yes/No

** PAYMENT CREDIT/DEBIT CARD & REQUIRED **

Name on Card		Account Number
Expiration Date	Security Code	Type of Card
Signature of Cardholder		

******A $25 BILLING CHARGE WILL APPLY IF THE ABOVE SECTION IS NOT COMPLETED******

After careful consideration for tax year 2022, we cannot avoid increasing our fees. Please expect a 20% increase on our tax preparation fee, additional forms/schedules and other required tax filings. As in the past, the total cost of tax preparation will fluctuate year to year and is calculated by the forms and schedules required in the current tax year.

**POPULAR OPTION ** - PAPERLESS, SECURE EMAIL PACKAGE

If you select this option BHTAX will email you the completed returns, signature forms, payment vouchers and estimated tax vouchers with instructions. If selected, there will be **NOTHING** mailed back to you including your documents. All documents will be scanned into our secure Server system and then destroyed. You also **MUST** prepay our fee by filling out credit/debit card information in order to select this option. Keep in mind that there are certain tax situations where filing this way is not a possibility. If that is the case you will default to the normal mailing method.

☐ CHECK THIS BOX IF YOU WANT THIS OPTION FOR TAX YEAR 2022

STIMULUS INFORMATION

1. Did you receive any stimulus payment in 2022 ? yes ☐ no ☐ How much did you receive ? ______________

INCLUDE IRS LETTER 6475 OR ANY OTHER CONFIRMATION OF AMOUNTS RECEIVED

ADVANCED CHILD TAX CREDIT INFORMATION

1. Did you fully opt out of the advance child tax credit ? yes ☐ no ☐

2. If not how much advance child tax credit did the you receive in 2022? ______________________

BE SURE TO INCLUDE ENTIRE AMOUNT RECEIVED BY BOTH TAXPAYER AND SPOUSE.

YOU MUST INCLUDE IRS LETTER 6419 OR ANY OTHER CONFIRMATION OF AMOUNTS RECEIVED.

VIRTUAL CURRENCY

☐ yes
☐ no

1. Did you receive, sell, exchange or otherwise dispose of any financial interest in any virtual currency at any time in 2022?

YOU MUST INCLUDE A REALIZED GAIN OR LOSS STATEMENT FROM ACCOUNT OR THIRD PARTY

FOREIGN ACCOUNT REPORTING

☐ yes
☐ no

1. Did you have a foreign financial account including an overseas bank account or even have signature authority with a foreign account?

2. If Q1 is yes, did the maximum value of all the foreign financial accounts in aggregate exceed **$10,000** at any time in 2022? If **Yes** then be sure to include additional information on the foreign account (s) Include the highest value of the account in 2022, country location, account number, name & addresss of institution.

HEALTHCARE

☐ yes
☐ no

1. Were you covered by an Employer or Retirement health care plan or Medicare the **entire** tax year 2022? If your coverage is from an exchange or marketplace you **must** include Form 1095-A with your tax information.

DRIVERS LICENSES

You must provide photocopies (Front & Back) of Drivers Licenses or State issued ID for BOTH Taxpayer and Spouse.

Check box if applies

INCOME ITEMS

SALARIES, WAGES, TIPS & OTHER COMPENSATION **W-2's**

☐ Taxpayer ☐ Spouse # of W-2's enclosed ________

PENSIONS, ANNUITIES, IRA DISTRIBUTIONS/CONVERSIONS ☐ Check Box if had a Roth IRA Conversion **1099 - R**

☐ Taxpayer ☐ Spouse # of 1099-R's enclosed ________

First year of retirement, enclose a final pay stub before retirement. For IRA distributions & conversions, provide basis in all IRA accounts. See Client letter.

SOCIAL SECURITY INCOME **SSA-1099**

☐ Taxpayer ☐ Spouse

☐ **SELF EMPLOYED INDIVIDUALS** **1099 - NEC**

Check box if involved in a business as a sole proprietor or a Single Member LLC. Complete enclosed self-employed worksheet.

☐ **PARTNERSHIPS, LLCs, S CORPORATIONS, ESTATES & TRUSTS** **K-1's**

# of K-1 Forms Enclosed _______ Enter date if receiving K-1 Form late _____________

☐ **RENTAL INCOME & ROYALTIES** **1099 - MISC**

Check box if you own or are involved in rental property and complete the enclosed rental worksheet.

☐ **INTEREST INCOME** **1099 - INT**

Include interest from Banks, Bonds, Credit Unions, Financial Institutions, Seller Financed Mortgages. (Do Not include IRA's)

# of 1099-INT's Enclosed _______

☐ **TAX-EXEMPT INTEREST**

Check box if you have interest income from State and Local Bonds. Enclose December or year-end brokerage statement.

☐ **DIVIDEND INCOME** **1099 - DIV**

From Stocks, Mutual Funds, etc. (Do Not Include IRA's)

# of 1099-DIV's Enclosed _______

☐ **STOCKS, MUTUAL FUNDS AND OTHER INVESTMENT GAINS (LOSSES)** **1099 - B**

Check box if you sold stock, mutual funds or other securities outside of a retirement plan. Include worthless securities, calls, puts & sale of stock options. Do not include transactions within an IRA account.

MUST include cost basis information. Transaction summaries from brokerage accounts are preferable. Otherwise complete the "Worksheet for Sale of Stock, Mutual Funds & Other Investments" available on our website.

☐ **Stock Options** Granted or Exercised in 2022. Submit detail of the options & send any 1099-B for the sale of exercised options.

☐ **FOREIGN BANK ACCOUNT** ☐ **OTHER FOREIGN ASSETS** See Foreign Reporting Requirement insert for more info.

Include highest value of the account in 2022, country location, account number & name & address of the financial institution on a separate worksheet.

☐ **INCOME FROM OTHER SOURCES**

$	☐ Alimony Received - If checked, Include Payer's Name & SS#:
$	☐ Awards, Grants & Prizes - If checked, Include Type:
$	☐ Cancellation of Debt - 1099-A or 1099-C - If checked, Enter Source of Debt:
$	☐ Distributions from a 529 plan or Education Savings Account - 1099-Q - If checked, Was Money Used for College?:
$	☐ Farm Income - If checked, provide info on Farm Worksheet available on our website www.OATaxPartners.com.
$	☐ Gambling & Lottery Winnings - W-2G & 1099-G - If checked, Include Losses:$
$	☐ Health Savings Account Withdrawals - 1099-SA
$	☐ Lawsuit Proceeds - 1099-MISC - If checked, Include Detail of Lawsuit & Legal Fees incurred:$
$	☐ Sale or transfer of rental or investment property. Submit closing statement and figures.
$	☐ State and Local Income Tax Refunds - 1099-G - If checked, Indicate State or Locality:
$	☐ Unemployment Compensation - 1099-G - If checked, Indicate State:
$	☐ Other - Please Specify: (Ex. Jury Duty)

SEND ALL TAX DOCUMENTS

DEDUCTIONS & CREDITS

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IF RELOCATED IN 2022 PLEASE PROVIDE DATE OF MOVE. SEE LAST PAGE FOR MOVING EXPENSES

DATE OF TRANSFER [ ] (Use reporting date if the move is a work transfer)

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ADJUSTMENTS TO INCOME

	Taxpayer	Spouse
Alimony Paid - Include on separate sheet the recipient's name & SS# and date the divorce decree was signed	$	$
IRA Contributions - **TRADITIONAL**	$	$
IRA Contributions - **ROTH** Note for Roth IRA's: If income exceeds $204K for MFJ / $129K for Single then your Roth IRA contribution is limited.	$	$
Student Loan Interest - Enclose Form 1098-E	$	$
Health Savings Account Contributions (Do NOT include FSA's)	$	$
Penalty from an early withdrawal of savings from a CD, etc.	$	$

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MEDICAL & DENTAL EXPENSES PAID (Long-Term Care & Health Insurance & Exp, Co-payments, Prescriptions, Dental, Eyecare, etc.) (See Checklist)

	$		$
	$		$
	$		$
	$		$
Medical Miles Incurred	miles	Less Insurance reimbursement for above expenses	($)

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STATE & LOCAL TAXES paid in 2022 due to tax notices or revised tax returns (Do NOT include withholdings or estimated tax pymts) $

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SALES TAX Provide Combined State & County Sales Tax Rate %

Sales Tax for the purchase of a new or used Vehicle, Boat & Plane bought anytime in 2022	$
Other Sales Tax if not using IRS tables (We will use tables if greater than total you provide in Other Sales Tax)	$

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PERSONAL PROPERTY TAX on Vehicles (Include Ad Valorem Tax & Car Registration for CA Residents) $

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REAL ESTATE TAXES & MORTGAGE INTEREST (HOME EQUITY INTEREST ALLOWED ON PURCHASE OR IMPROVEMENTS)

Property Address (Include loan interest from Boats & RV's here)	Type of Property (Ex. Primary Res, Rental, Vacation, 2nd Home)	Real Estate Taxes	Mortgage Interest/MIP (If paid to an individual provide name & SS#)
		$	$
		$	$
		$	$
		$	$

Points Paid (Include HUD-1 closing stmt or 1098 if applicable) ☐ Purchase ☐ Refinance $

☐ Bought or Sold a home in 2022 (Include closing statements)
☐ Refinanced home mortgage during 2022 (Include closing statements)

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CONTRIBUTIONS

Cash/Check/Credit Card Requirement from the IRS: (In order to claim this deduction, you must retain a bank record or written acknowledgement from the charitable organization.) **List cash donations below.**

Name of Organization	Donation Amount	Name of Organization	Donation Amount
	$		$
	$		$
	$		$
	$		$
	$		$

Clothing & Other than cash The condition of the donated items must be in good used condition or better AND if the value of each donation is greater than $250 there must be signed written acknowledgement from the charitable organization **Send all non-cash donation receipts.**

Name of Organization & Date of Donation	Value Amount	Name of Organization & Date of Donation	Value Amount
	$		$
	$		$
	$		$
	$		$
	$		$

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☐ **CASUALTY LOSS DEDUCTION (CHECK BOX ONLY IF YOU HAD A LOSS IN A FEDERALLY DECLARED DISASTER AREA.)**

Provide an attachment that includes a description of the loss, fair market value of asset before and after casualty & insurance reimbursement.

☐ **ADOPTION CREDIT** (Check box if you adopted a child or are in the process of adoption in 2022)

Indicate if the child is special needs or a foreign child. Provide a list of qualified expenses. Indicate when the adoption is expected to be final.

☐ **AUTO ENERGY CREDIT** (Purchase of a NEW Electric or Plug-In Hybrid Vehicle in Year 2022 and/or Charging Equipment & Installation.)

Provide invoice with the following info: 1. Make, Model & Year of Vehicle 2. Date of Purchase 3. Cost 4. VIN#

☐ **HOME ENERGY AND SOLAR TAX CREDIT** (Includes windows, doors, insulation, HVAC, solar electric, solar water heating, wind energy and geothermal heat pump costs) Include all documentation on purchase of new property in 2022.

COLLEGE EXPENSES (Please enclose Form 1098-T)

	Student (1)	Student (2)	Student (3)
Student Name			
College Name			
Tuition & Fees **Paid**	$	$	$
Books, Supplies & Equipment	$	$	$
Year of Study (please circle)	1st, 2nd, 3rd, 4th or Graduate	1st, 2nd, 3rd, 4th or Graduate	1st, 2nd, 3rd, 4th or Graduate

529 COLLEGE SAVINGS PLAN CONTRIBUTIONS (Include Child's Name/State Plan/Amount) (Send Documentation of the Plan)

Child's Name	Name of Plan	State Plan (Ex. NY, MD, VA, etc.)	Amount
			$
			$
			$

CHILD CARE AND DEPENDENT CARE CREDIT (Must request a SS# or EIN (business #) from the caretaker to claim the credit)

☐ Check box if you or your spouse participate in a dependent care benefit program through an employer. (Must include daycare info below)

☐ Check box if you and spouse paid for daycare to attend school full time or due to a disability. Child must be 13 years of age or younger.

Name of Person or Daycare Provider	Address	Identification number (SSN or EIN)	Amount Paid	Child's Name Being Cared For
			$	
			$	
			$	

ADDITIONAL INFORMATION (Check if applies)

☐ $3 to go to the Presidential Election Fund.

☐ Lived in a Foreign Country: Name of Country: ____________________ Include a Schedule of Days Overseas: ____

☐ Rent paid for a Primary Residence. (ONLY APPLIES TO CERTAIN STATE TAX RETURNS) Include amount paid & # of months.

☐ National Guard Member or Armed Forces reservist and traveled more than 100 miles & stayed overnight. Provide a detailed expense worksheet.

2022 ESTIMATED INCOME TAX YOU PAID QUARTERLY BY CHECK OR ELECTRONICALLY

Federal Payment Record

Date Due	Amount	Check #	Date Sent
1st Quarterly Payment	$		
2nd Quarterly Payment	$		
3rd Quarterly Payment	$		
4th Quarterly Payment	$		

State Payment Record

Date Due	Amount	Check #	Date Sent
1st Quarterly Payment	$		
2nd Quarterly Payment	$		
3rd Quarterly Payment	$		
4th Quarterly Payment	$		

PLEASE INCLUDE PROOF OF PAYMENT FOR ANY QUARTERLY ESTIMATES PAID.

STATE AND LOCAL SPECIFIC DEDUCTIONS

ONLY FOR STATES THAT ALLOW THESE SPECIFIC DEDUCTIONS NO LONGER AVAILABLE WITH IRS
(IF YOU ARE UNSURE IF YOUR STATE/LOCAL APPLIES, PLEASE FILL OUT AND WE WILL USE IF NECESSARY)

MOVING COSTS (Please include any detailed schedule given to you by your employer.) NOTE: Temporary Quarters & Househunting Trips are NOT deductible.

Foreign Service Officers must separate Home Leave Expenses from Moving Expenses - Place an "H" next to Home Leave Expenses. (See Letter for more info)

Reason for the Move (Job Transfer, Retirement, etc.):			
Transportation of Belongings	$	Storage Fees while Overseas	$
Travel, Room & Board	$	30 Days of Storage for Domestic Moves	$

MISCELLANEOUS DEDUCTIONS (Do not duplicate amounts from attached sheets or schedules) (See Checklist & Work Expense Schedules)

Tax Return Preparation Fee that was paid in 2022	$	Job Search Expenses	$
Safe Deposit Box	$	Investment Interest - Margin Int.	$
Legal Fees (Related to generation or protection of income)	$	Investment Publications & Exp.	$
	$		$
	$		$

OTHER EMPLOYEE EXPENSE WORKSHEETS ARE AVAILABLE AT "BHTAXSERVICE.COM"

LAW ENFORCEMENT EXPENSE SHEET

SCHOOL TEACHER EXPENSE SHEET

NURSE EXPENSE SHEET

FLIGHT ATTENDANT EXPENSE SHEET

ALL OTHER OCCUPATIONS EXPENSE SHEET

ALTHOUGH COMPLETION OF THIS QUESTIONNAIRE IS REQUIRED BY THE IRS, BALDWIN HILLS TAX SERVICE HAS BEEN REQUESTING IT FOR OVER 30 YEARS. WHY? BECAUSE COMPLETING THIS QUESTIONNAIRE WILL ENSURE AN ACCURATE TAX RETURN MAXIMIZING ALL DEDUCTIONS AND TAX CREDITS YOU QUALIFY FOR. THIS WILL YIELD YOU THE OVERALL BEST POSSIBLE RESULT.

FILING TAXES IS A REQUIREMENT, PAYING MORE TAX THAN YOU SHOULD IS NOT!