

2022

1040

US

## Miscellaneous Questions

If any of the following items pertain to you or your spouse for 2022, please check the appropriate box and provide additional information if necessary.

## PERSONAL INFORMATION

- | Yes                      | No                       |  |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Did your <u>marital status</u> CHANGE during the year?   |
| <input type="checkbox"/> | <input type="checkbox"/> | Did your <u>name</u> CHANGE during the year?   |
| <input type="checkbox"/> | <input type="checkbox"/> | Did your <u>address</u> CHANGE during the year?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Could you be claimed as a <u>dependent</u> on <u>another person's</u> tax return for 2022?                                 |
| <input type="checkbox"/> | <input type="checkbox"/> | Were you or your spouse issued an <u>Identity Protection PIN</u> by the IRS? <b>If yes, please provide copy of letter.</b> |

## DEPENDENTS

- |                          |                          |  |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Were there any CHANGES in dependents? (Include non-child dependents for whom you provided more than half the support, common example: parents.)  |
| <input type="checkbox"/> | <input type="checkbox"/> | Were any of your unmarried children, who might be claimed as dependents, under 19 years of age (or under 24 years if full-time student) at the end of 2022?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have any children under age 19 or full-time students under age 24 at the end of 2022, with interest and dividend income in excess of \$1,150, or total investment income in excess of \$2,300? |

## INCOME

- |                          |                          |  |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Did you RECEIVE <u>unemployment benefits</u> ? <b>If yes, please provide a copy of Form 1099-G.</b>  |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you RECEIVE gambling income or lottery winnings? <b>If yes, please provide copies of Form W-2G and a list of gambling losses.</b>  |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you rent out your principal residence or vacation home? <b>If you utilized AirBNB or VRBO provide the rental documentation you received.</b>   |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you RECEIVE unreported <u>tip income</u> of \$20 or more in any month?   |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you RECEIVE grants of <u>stock options</u> from your employer, EXERCISE any <u>stock options</u> granted to you or DISPOSE any stock acquired under a <u>qualified employee stock purchase plan</u> ? <b>If yes, please provide documentation for transactions or Form 3922 for ESPP transactions.</b> |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you RECEIVE any <u>disability income</u> ? <b>If yes, was the benefit employer provided?</b>   |

2022

1040

US

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## PURCHASES, SALES AND DEBT

- | Yes                      | No                       |   |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Did you START a business or farm, purchase rental or royalty property, or acquire an interest in a partnership, S corporation, trust, or REMIC?   |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you PURCHASE or DISPOSE of any business assets (furniture, equipment, vehicles, real estate, etc.), or CONVERT any personal assets to business use?   |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you BUY or SELL any stocks, bonds or other investment property in 2022 <u>not</u> reported on Form 1099-B?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive, sell, exchange or dispose of any CRYPTOCURRENCY (i.e., Bitcoin) in 2022? Did you receive a Form 1099K? <b>Please provide copy.</b>   |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you sell or do you plan to sell any dividend generating stocks or mutual funds during the first 60 days of 2023? (This is <u>not applicable</u> if you hold your investments within a commercial brokerage firm, as the brokerage firm will track this information on your behalf.) |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you PURCHASE, SELL, or REFINANCE your principal home or second home, or did you take a home equity loan? <b>If yes, include a copy of the final settlement statement.</b>   |
| <input type="checkbox"/> | <input type="checkbox"/> | If you SOLD your residence or vacation property, <u>did you ever rent out the property?</u>   |
| <input type="checkbox"/> | <input type="checkbox"/> | If you SOLD your residence, did you <u>own and occupy</u> as your principal residence for at least <u>two of the last five years</u> prior to the sale?   |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have any debts CANCELLED or FORGIVEN? <b>If yes, include copies of Form 1099-C if received?</b>   |
| <input type="checkbox"/> | <input type="checkbox"/> | Does anyone owe you money which has become UNCOLLECTIBLE? <b><u>If yes, provide detail of debtor's name, relationship to you, amount, description of debt, and description of efforts to collect debt.</u></b>  |

## RETIREMENT PLANS

- |                          |                          |  |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Did you RECEIVE a <u>distribution</u> from a retirement plan (401(k), IRA, ROTH, SEP, SIMPLE, Qualified Plan, etc.) <b>If yes, please provide copy of Form 1099-R.</b> |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you MAKE a <u>contribution</u> to a retirement plan (401(k), IRA, ROTH, SEP, SIMPLE, Qualified Plan, etc.)   |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you TRANSFER or ROLLOVER any amount from one retirement plan to another retirement plan? <b>If yes, please provide transaction information.</b>                    |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you CONVERT part or all of your traditional, SEP, or SIMPLE IRA to a Roth IRA in 2022?   |

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1040

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## Miscellaneous Questions

## RETIREMENT PLANS (Cont'd.)

- | Yes                      | No                       |                                |
|--------------------------|--------------------------|--------------------------------|
| <input type="checkbox"/> | <input type="checkbox"/> | Did you RETIRE or CHANGE jobs? |

## EDUCATION

- |                          |                          |   |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive a DISTRIBUTION from an Education Savings Account or a Qualified Tuition Program (529 Plan)? <b>If yes, please include Form 1099-Q.</b>                              |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you, your spouse, or a dependent incur any tuition expenses that are required to attend a college, university, or vocational school? <b>If yes, please include Form 1098-T.</b> |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you pay any student loan interest? <b>If yes, please include Form 1098-E.</b>   |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive a refund of tuition paid? <b>If yes, please include Form 1098-T.</b>  |

## FOREIGN INCOME AND BANK ACCOUNT

- |                          |                          |  |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have any FOREIGN INCOME or pay any FOREIGN TAXES? (Do NOT count foreign income and taxes reported on your brokerage statement.)  |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have an INTEREST IN or SIGNATURE AUTHORITY over a <u>financial account in a foreign country</u> , such as a bank account, securities account, or other financial account?      |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you own any FOREIGN ASSETS other than financial assets? (Examples may include: foreign trusts, ownership in a foreign company, foreign retirement plans and /or a foreign estate.) |

## ITEMIZED DEDUCTIONS

- |                          |                          |  |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Did you make any LARGE PURCHASES, such as motor vehicles and boats? <b>If yes, provide sales tax paid on purchases.</b>  |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you remodel or make CAPITAL IMPROVEMENTS to your house? <b>If yes, provide sales tax paid.</b>   |
| <input type="checkbox"/> | <input type="checkbox"/> | Do you have HELOC interest expense? <b>If yes, what were the loan proceeds used for.</b>   |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you make NON-CASH CHARITABLE CONTRIBUTIONS greater than \$500? <b>If yes, provide the name and address of charity, thrift shop value of donation, date of contribution, and description of contribution.</b> |

## TAX CREDITS

- |                          |                          |   |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Did you pay for childcare while you or your spouse worked or looked for work? |
|--------------------------|--------------------------|---|

2022

1040

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## Miscellaneous Questions

## TAX CREDITS (Cont'd.)

- | Yes                      | No                       |  |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Do you PAY health insurance through an Obamacare Exchange? If yes, did you receive IRS document Form 1095-A (Health Insurance Marketplace Statement)? <b>If yes please attach.</b>   |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you PURCHASE a new qualified plug-in <u>electric motor vehicle</u> ? <b>If yes, please provide year, make model of vehicle VIN # and date of purchase.</b>   |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you make any purchases that qualify for the <u>Residential Clean Energy Credit</u> such as SOLAR PANEL INSTALLATIONS? This credit can be up to 30% of your purchase price.   |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you make any purchases that qualify for the <u>Energy Efficient Home Improvement Credit</u> such as energy efficient windows and exterior doors, specified heat pumps and heat pump water heaters. There are strict limits on amounts of credits available for each type of improvement. |

## ESTIMATED TAXES

- |                          |                          |   |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Did you <b>apply an overpayment</b> of 2021 taxes to your 2022 estimated tax (instead of being refunded)?                               |
| <input type="checkbox"/> | <input type="checkbox"/> | If you have an overpayment of 2022 taxes, do you want the excess <b>APPLIED</b> to your 2023 estimated tax (instead of being refunded)? |
| <input type="checkbox"/> | <input type="checkbox"/> | Do you expect your 2023 taxable income and withholdings to be DIFFERENT from 2022?  |

## MISCELLANEOUS

- |                          |                          |  |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Do you want to allocate \$3 to the Presidential Election Campaign Fund?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Does your spouse want to allocate \$3 to the Presidential Election Campaign Fund?  |
| <input type="checkbox"/> | <input type="checkbox"/> | May the IRS discuss your tax return with McDevitt & Duffy CPAs, PS?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you pay <u>in excess of \$2,300</u> during the year for domestic services performed in or around your home to individuals who could be considered <u>HOUSEHOLD EMPLOYEES</u> ? (If only the worker can control how the work is done, the worker isn't your employee but is self-employed. A self-employed worker usually provides their own tools and offers services to the general public in an independent business. For more information see IRS Publication 926: Household Employer's Tax Guide.) |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you engage in any BARTERING transactions?  |

2022

1040

US

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## MISCELLANEOUS (Cont'd.)

- | Yes                      | No                       |  |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Were you NOTIFIED or AUDITED by either the IRS or the State taxing agency? For example, did the IRS send you a tax notice <b>changing</b> your 2021 tax refund or overpayment. |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you or your spouse make any GIFTS to an individual that <u>total more than \$16,000</u> , or any gifts to a trust?   |
| <input type="checkbox"/> | <input type="checkbox"/> | Did your bank account information CHANGE within the last twelve months (for electronic deposit of refund or payment of tax)?   |

## ADMINISTRATION

- |                          |                          |  |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Would you like us to EMAIL your organizer to you next year?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Would you like to receive your finished 2022 tax package ELECTRONICALLY? In one application you would get PDF copies of your tax return, invoice and your original documents and you would sign your return electronically.  |
| <input type="checkbox"/> | <input type="checkbox"/> | Would you be interested in HOLISTIC FINANCIAL PLANNING? This financial planning would include cash flow, investment management, risk management, estate and tax planning services.   |
| <input type="checkbox"/> | <input type="checkbox"/> | Would you like to contribute to or max out your IRA or ROTH IRA for 2022 before April 15th? Or if you are self-employed, maximize your retirement contribution?  |
| <input type="checkbox"/> | <input type="checkbox"/> | If you <u>don't qualify</u> to make a ROTH IRA contribution, would you like to discuss making a " <u>back-door ROTH IRA</u> " contribution? (This is an administrative loophole to enable some people to sidestep the ROTH IRA contribution rules even though they didn't qualify originally.) |
| <input type="checkbox"/> | <input type="checkbox"/> | Would you like to contribute to or max out your <u>HSA account</u> (Health Savings Account) for 2022 before April 15th? (To qualify your minimum health insurance deductible must be \$1,400 for a single plan and \$2,800 for a family plan).   |

If you would like to make a TAX APPOINTMENT

\* Call Charity for an appointment (425) 774-5300

\* Email Charity at Charity@McDuffyCPA.com

I have read McDevitt & Duffy CPAs PS's Individual Tax Return Engagement Letter. The terms of this engagement are acceptable to me. (If this is a joint return, I am signing for both of us.) The information I have provided or will provide in connection with this tax return is true, correct and complete to the best of my knowledge.

APPROVED BY: \_\_\_\_\_ DATE: \_\_\_\_\_