



ARTOLA & ASSOCIATES, INC.

Tax and Accounting Services

2022 Income Tax Organizer

| | | |
|---------------|-------|--------------|
| Taxpayer Name | | Occupation |
| Spouse's Name | | Occupation |
| Address | | |
| City | State | Zip Code |
| Email Address | | Phone Number |

DEPENDENT CHILDREN (who lived with your more than 6 months)

| Name | SSN (if new dependent) | DOB | School Grade | School expenses? Yes No | Daycare Expenses? Yes No |
|------|------------------------|-----|--------------|-------------------------|--------------------------|
| | | | | | |
| | | | | | |
| | | | | | |

If yes, please attach receipts

If yes, please attached stmt

Foreign Accounts

Do you have any financial interest or signature authority over a foreign account? Yes No

Digital Assets

(crypto currency, virtual currency, non-fungible tokens (NFTs),etc)

At any time during 2022, did you: (a) receive, sell or (b) sell, exchange, gift or otherwise dispose of a digital asset (or financial interest in a digital asset)

Yes No

Minnesota Only Questions

Would you like to donate to the MN Nongame Wildlife fund? (will decrease your refund or increase your amount due)

Donation Amount \$ _____

MN Frontline Work Pay received Taxpayer \$ _____ Spouse \$ _____

OTHER INFORMATION, CHANGES OR QUESTIONS YOU WOULD LIKE ADDRESSED:

Please sign below and return with your documents

SIGNATURE _____

DATE _____

THINGS WE NEED ✓

Bring with you, mail in or secure upload

| | | | |
|--------------------------|---|--------------------------|---|
| <input type="checkbox"/> | Previous year tax return (If new client) | <input type="checkbox"/> | Closing papers for purchases & sales |
| <input type="checkbox"/> | W-2 Forms | <input type="checkbox"/> | Property Tax Statements |
| <input type="checkbox"/> | 1099-R Retirement | <input type="checkbox"/> | 1098 Forms - Mortgage Int, Tuition, Student Loans |
| <input type="checkbox"/> | 1099 Forms for Interest, Dividends, Social Security, Unemployment | <input type="checkbox"/> | 1099B Forms proceeds from Broker & Barter Exchanges |
| <input type="checkbox"/> | K-1s from Partnerships, Corporations or Estates | <input type="checkbox"/> | Proof of Health Insurance - Form 1095 |
| <input type="checkbox"/> | Statements for Assets held outside the US | <input type="checkbox"/> | All other statements showing income |
| <input type="checkbox"/> | HSA Forms (1099-SA & 5498-SA) | <input type="checkbox"/> | 1099 MISC |

(over)

OTHER INCOME

Rental/Self-Employment/Farm Income ? YES NO

If yes, please attach Income and Expenses

| | | |
|----------------------------|----|---|
| Roth Conversions | \$ | - |
| Jury Duty/Election Judging | \$ | - |
| Gambling Winnings | \$ | - |
| Alimony Received | \$ | - |
| Prizes/Awards | \$ | - |
| Scholarships & Fellowships | \$ | - |
| Debt Cancellation | \$ | - |
| Partnerships and S-Corps | \$ | - |
| Estates & Trusts | \$ | - |
| State Tax Refunds | \$ | - |
| Royalties | \$ | - |

| | | |
|---------------------------------|----|---|
| Sick pay or Disability | \$ | - |
| Veterans Payments | \$ | - |
| Withdrawals from HSA/MSA | \$ | - |
| Hobby Income | \$ | - |
| Odd Jobs/Side Jobs | \$ | - |
| Research, Survey, Online Income | \$ | - |
| Insurance Claims/Lawsuits | \$ | - |
| Public Assistance | \$ | - |
| Barter | \$ | - |
| Foreign Income | \$ | - |
| Other | \$ | - |

ADJUSTMENTS, DEDUCTIONS & OTHER

| IRAS | | | |
|--|------|---------|------|
| Contributions | | Type? | |
| Taxpayer | \$ - | Regular | Roth |
| Spouse | \$ - | Regular | Roth |
| | | | |
| Withdrawals | | Type? | |
| Taxpayer | \$ - | Regular | Roth |
| Spouse | \$ - | Regular | Roth |
| Penalties for Early withdrawal? Yes No | | | |

| PROPERTY TAXES PAID | |
|---------------------|--------|
| Type | Amount |
| Primary Residence | \$ - |
| Second Home | \$ - |
| Vehicle | \$ - |
| Vehicle | \$ - |
| Other | \$ - |

| INTEREST EXPENSE | |
|---|------|
| Home Mortgage (Form 1098) | \$ - |
| First Mortgage/Refinance | \$ - |
| Loan Orig Fee/Discount Fee | \$ - |
| Second Mortgage | \$ - |
| Home Equity | \$ - |
| Equity only used to improve/build/improve home? Yes | |
| Mortgage Insurance (PIM) | \$ - |
| Second Home Interest | \$ - |

| CONTRIBUTIONS | |
|-------------------------|------|
| Churches (receipted) | \$ - |
| Other Money (receipted) | \$ - |
| Charitable Auto Miles | - |
| Volunteer Expenses | \$ - |
| Property Donated* | \$ - |

*if over \$500 total of donated property, please attach details for each donation - donation organization and TIN, date of donation, value of property donated

| ESTIMATED TAX PAYMENTS | | | |
|-----------------------------------|--|--------|------|
| 2022 Estimated Payments - Federal | | | |
| Date | | Amount | \$ - |
| Date | | Amount | \$ - |
| Date | | Amount | \$ - |
| Date | | Amount | \$ - |
| | | | |
| 2022 Estimated Payments - State | | | |
| Date | | Amt | \$ - |
| Date | | Amt | \$ - |
| Date | | Amt | \$ - |
| Date | | Amt | \$ - |

| MEDICAL EXPENSES | |
|-----------------------------------|------|
| Insurance & Medicare (not pretax) | \$ - |
| Long Term Care | \$ - |
| Taxpayer | \$ - |
| Spouse | \$ - |
| Prescriptions | \$ - |
| Eyeglass, Hearing Aids, Batteries | \$ - |
| Doctors | \$ - |
| Dentists | \$ - |
| Hospital/Ambulance | \$ - |
| Medical Miles | \$ - |
| Other Medical Travel | \$ - |
| Reimbursements | \$ - |

| HSA/MSA | |
|---------------|------|
| Contributions | |
| Taxpayer | \$ - |
| Spouse | \$ - |
| | |
| Withdrawals | |
| Taxpayer | \$ - |
| Spouse | \$ - |