

**Sam Phillips, CPA
1040 Client Fact Sheet
Income Tax Year 2022**

Today's Date ____/____/2023

Taxpayer's Name _____ DOB ____/____/____ Soc Sec # ____ - ____ - ____

Spouse's Name _____ DOB ____/____/____ Soc Sec # ____ - ____ - ____

Address _____ County _____

Phone _____ Email _____

How do you want us to contact you? Call Text Email No Preference

What format would you like when your return is complete?

- I prefer to pick up a paper copy of my return I prefer to download a digital copy

Filing Status Married Filing Jointly Married Filing Separately
 Single Head of Household (see addt'l form)
 Surviving Spouse Dependent on someone else's return
(Date of spouse's death: ____/____/____)

Please complete Dependent Questionnaire Form to CLAIM DEPENDENTS!

Please check all of the following that applies to you in 2022:

- Had a business or were self-employed in 2022
- Paid property taxes (How many parcels? ____ County? _____)
- Bought/sold/inherited property (include closing statement)
- Made state or federal estimated tax payments
- Had a bank account outside of the United States
- Installed geothermal, solar units, or any other qualified energy efficient home improvements
- Had transactions involving cyber currency (e.g. Bitcoin, etc.)
- Gave away property or cash greater than \$16,000
- Purchased health insurance through the marketplace (copy of 1095A must be provided)
- Paid or Received alimony
- Paid childcare
- Paid a household employee (babysitter/caregiver/housekeeper) over \$2,400
- Paid private school tuition for a dependent in grades K-12
- Had college expenses for yourself or a dependent
- Paid interest on a student loan
- Interested in contributing to an IRA if that would save you taxes



Preferred Tax REFUND Option, if applicable (check one)

- Paper Check
- Series I Savings Bonds
- Direct Deposit (Please provide bank information)

Preferred Tax PAYMENT Option, if applicable (check one)

- Paper Check
- Direct Debit (Please provide bank information)

Bank Name _____ Checking Savings

Routing # _____

Account # _____

Are you waiting on any additional tax forms? If so, please describe:

Is there anything else you would like us to know about before completing your tax returns? Please tell us:

PLEASE SIGN BELOW

To the best of my knowledge the enclosed information is correct and includes all income, deductions, and other information necessary for the preparation of this year's income tax returns for which I have adequate records.

Signature _____



Date ____ / ____ / 2023

Thank you for choosing Sam Phillips, CPA!