Taylor Hill
Enrolled Agent: 00134684-EA| LTC 35289-C
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What You Want in 2022

At Hill Tax, Payroll & Bookkeeping we want to help you achieve the goals that are important to you. By answering the following questions, we will be able to understand your unique situation better (this is not required to be completed). We look forward to being your Business & Tax Partner.

Please tell us 3 things you would like to accomplish in 2022 to improve your business situation.

1.____

2.____

3.____

Please share 3 things that you would like Hill Tax to do to help you accomplish the above in 2022.

1.____

2.____

3.____

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Items needed for 2021 Personal Income Tax Return

Please provide photocopies of the following information for us to complete your 2021 Income Tax Return. Please do not send the originals to us. We ask that you retain the originals in a safe place in your possession in case questions arise or further information is needed from them in the future.

General information

1) Refer to the Basic Taxpayer Organizer.
2) Copies of last two years Federal & State tax returns. **If we prepared your returns, there is no need to send copies.**
3) Photocopies of identification to prove identity (generally a driver's license or passport showing photo, name, and identification)

Income information

1) Copies of all W-2 forms that you or your spouse may have received from your employer(s).
2) Copies of 1099 forms that you may have received for other income.
3) Copies of 1099-INT or 1099-DIV forms that show interest or dividend income.
4) Copy of last year's state tax refund (usually received on a 1099-G)
5) Distributions from a Health Savings Account (Form 1099-SA).
6) Distributions from IRA, 401(K) or other retirement accounts (Form 1099-R)
7) Documentation on capital gains you may have had through asset sales in 2021.
8) Unemployment compensation (usually received on a 1099-G)
9) Social Security benefits received (1099-SAA)
10) Any other types of income you may have for 2021.

Adjustments to Income

1) Contributions to a Health Savings Account (Form 5498-SA)
2) Moving expenses (only if it was due to being a member of active Armed Forces)
3) Contributions to SEP, Simple or other qualified plans (if not listed on W-2)
4) Premiums paid for self-employed health insurance (Medical & Dental)
5) Alimony paid and date of divorce (date of divorce determines deductibility)
6) IRA contributions for 2021 (if not listed on W-2)
7) Student loan interest paid (Form 1098-E)
8) Tuition and fees paid for college education (Form 1098-T)

Itemized deductions

1) Medical expenses (doctors, dentists, eyeglasses, prescriptions, employee health insurance premiums, etc.)
2) Real estate taxes paid (please list separately for each property)
3) Personal property tax paid (automobiles, etc.)
4) Mortgage interest paid on your residence (Form 1098 or other documentation).
5) Points paid on your residence.
6) Charitable contributions by cash or check (only to qualified Nonprofits)

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Itemized deductions (continued)

7) Charitable contributions made in kind (clothing, automobiles, furniture, etc.). If over $500, we will need the slip and a fair market value of the items donated). We have a Donation Calculator to assist you on our website available for download on our "Resources" page.
8) Casualty losses from theft or fire.
9) Unreimbursed business expenses (only for Armed Forces reservists, Qualified performing artists, Fee-basis state and local government officials, or employees with impairment-related work expenses)
10) Legal fees related to producing or collecting taxable income or getting tax advice.
11) Tax preparation fees only if associated with business or rental portion of tax return.

Other deductions and credits

1) Child and dependent care costs (need FEIN/SSN, name, address, and amount)
2) Credit for elderly or disabled.
3) Residential energy credit for improving the efficiency of your home.
4) Taxes paid to foreign country.

Payments

1) Documentation of payments or estimated payments that you may have made toward your 2021 taxes. (Does not include amount paid with 2020 return for additional taxes owed for 2020)

If you owned a business that could be considered a sole proprietorship in 2020, we need the following information to complete the Schedule C for your tax return:

1) What activity the business was engaged in.
2) Total revenue earned by the business in 2021.
3) Categorized expenses incurred by the business in 2021.
4) Total miles and total business miles driven for the year and year/make/model of vehicle.
5) Information on a home office if one was used. Download our Home Office spreadsheet on our website under our "Resources" page.
6) Any depreciable assets used by the business over $2,500. (Computers, office furniture, etc.)

If you personally owned rental properties in 2021, we need the following information for your Schedule E:

1) Address and location of new properties.
2) Amount paid for the new properties purchase.
3) Rental income for the individual properties.
4) Cost of any improvements made to the properties.
5) Expenses for the maintenance and operation of the properties.
6) Information as to whether or not you can be considered a real estate professional. (The greater of 750 hours **and** more than 50% of your personal services, if you have another job, devoted to working in real estate activities for 2021)
7) HUD Statements (closing statements) on any property purchased in 2021.

Thank you for allowing us to assist you in this process.