

# 2022

## Questions

Please check the appropriate box and include all necessary details and documentation.

|                                                                                                                                                                                                                                                                                                                                | Yes                      | No                       |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------|--------------------------|
| <b>Personal Information</b>                                                                                                                                                                                                                                                                                                    |                          |                          |
| Did your marital status change during the year?                                                                                                                                                                                                                                                                                | <input type="checkbox"/> | <input type="checkbox"/> |
| If yes, explain: _____                                                                                                                                                                                                                                                                                                         |                          |                          |
| Did you live separately from your spouse during the last six months of the year?                                                                                                                                                                                                                                               | <input type="checkbox"/> | <input type="checkbox"/> |
| Do you have a separate decree, instrument, or agreement and are not living in the same household by the end of the year?                                                                                                                                                                                                       | <input type="checkbox"/> | <input type="checkbox"/> |
| Did your address change from last year?                                                                                                                                                                                                                                                                                        | <input type="checkbox"/> | <input type="checkbox"/> |
| Can you be claimed as a dependent by another taxpayer?                                                                                                                                                                                                                                                                         | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you change any bank accounts, or did routing transit numbers (RTN) and/or bank account number change for existing bank accounts that have been used to direct deposit (or direct debit) funds from (or to) the IRS or other taxing authority during the tax year?                                                          | <input type="checkbox"/> | <input type="checkbox"/> |
| Do you, your spouse (if applicable), and any dependents have a taxpayer identification number (SSN, ITIN, or ATIN)?                                                                                                                                                                                                            | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you receive an Identity Protection PIN (IP PIN) from the IRS or have you been a victim of identity theft? If yes, attach the IRS letter for filing returns in 2022.                                                                                                                                                        | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you reside in or operate a business in a Federally declared disaster area? The Federally declared disaster areas include victims of hurricanes, tropical storms, floods, as well as wildfires.                                                                                                                             | <input type="checkbox"/> | <input type="checkbox"/> |
| <b>COVID-19 Information</b>                                                                                                                                                                                                                                                                                                    |                          |                          |
| Did you receive State and Local Fiscal Recovery Funds (SLFR) under a program to support those negatively impacted by the COVID-19 pandemic for helping you with your mortgage insurance and/or home purchases, such as funds to pay some or all of the down payment and closing costs associated with your purchase of a home? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you receive a Paycheck Protection Program (PPP) loan?                                                                                                                                                                                                                                                                      | <input type="checkbox"/> | <input type="checkbox"/> |
| If yes, did you apply for Paycheck Protection Program (PPP) loan forgiveness?                                                                                                                                                                                                                                                  | <input type="checkbox"/> | <input type="checkbox"/> |
| Are you a telecommuting employee that was required to "shelter in place" due to local COVID-19 protocols while working in a state that was not your home state?                                                                                                                                                                | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you pay emergency sick leave wages to a household employee?                                                                                                                                                                                                                                                                | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you pay emergency family leave wages to a household employee?                                                                                                                                                                                                                                                              | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you receive any special unemployment benefits or compensation under the Coronavirus Relief Act during the year?                                                                                                                                                                                                            | <input type="checkbox"/> | <input type="checkbox"/> |
| <b>Dependent Information</b>                                                                                                                                                                                                                                                                                                   |                          |                          |
| Were there any changes in dependents from the prior year?                                                                                                                                                                                                                                                                      | <input type="checkbox"/> | <input type="checkbox"/> |
| If yes, explain: _____                                                                                                                                                                                                                                                                                                         |                          |                          |
| Do you have any children under age 19 or a full-time student under age 24 with unearned income in excess of \$2,300?                                                                                                                                                                                                           | <input type="checkbox"/> | <input type="checkbox"/> |
| Do you have dependents who must file a tax return?                                                                                                                                                                                                                                                                             | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you provide over half the support for any other person(s) other than your dependent children during the year?                                                                                                                                                                                                              | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you pay for child care while you worked, looked for work, or while a full-time student?                                                                                                                                                                                                                                    | <input type="checkbox"/> | <input type="checkbox"/> |
| Is there any other person(s) who lived with you more than half the year but not claimed by you last year?                                                                                                                                                                                                                      | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you pay any expenses related to the adoption of a child during the year?                                                                                                                                                                                                                                                   | <input type="checkbox"/> | <input type="checkbox"/> |
| If you are divorced or separated with child(ren), do you have a divorce decree or other form of separation agreement which establishes custodial responsibilities?                                                                                                                                                             | <input type="checkbox"/> | <input type="checkbox"/> |

OVER



# 2022

- Did anyone in your family receive a scholarship of any kind during the year?
- If yes, were any of the scholarship funds used for expenses other than tuition, such as room and board?
- Did you make any withdrawals from an education savings or 529 Plan account?
- If yes, were any of these withdrawals rolled over into an ABLA (Achieving a Better Life Experience) account?
- Did you make any contributions to an education savings or 529 Plan account?
- Did you pay any student loan interest this year?
- Did you cash any Series EE or I U.S. Savings bonds issued after 1989?
- Would you like a worksheet to aid in the completion of a Free Application for Federal Student Aid (FAFSA) with the U.S. Department of Education?

## Health Care Information

- Did you have qualifying health care coverage, such as employer-sponsored coverage or government-sponsored coverage (i.e. Medicare/Medicaid) for your family? "Your family" for health care coverage refers to you, your spouse if filing jointly, and anyone you can claim as a dependent.
- Did you enroll for lower cost Marketplace Coverage through healthcare.gov under the Affordable Care Act?
- Did you enroll for lower cost Marketplace Coverage through healthcare.gov under the Affordable Care Act and share a policy with anyone who is not included in your family?
- Did you make any contributions to a Health savings account (HSA) or Archer MSA?
- Did you receive any distributions from a Health savings account (HSA), Archer MSA, or Medicare Advantage MSA this year?
- Did you pay long-term care premiums for yourself or your family?
- Did you make any contributions to an ABLA (Achieving a Better Life Experience) account?
- Did you receive any withdrawals from an ABLA (Achieving a Better Life Experience) account?
- If you are a business owner, did you pay health insurance premiums for your employees this year?

## Itemized Deduction Information

- Did you incur a casualty or theft loss or any condemnation awards during the year?
- If yes, did the loss occur in a Federally declared disaster area?
- Did you pay out-of-pocket medical expenses (Co-pays, prescription drugs, etc.)?
- Did you make any cash or noncash charitable contributions (clothes, furniture, etc.)?
- If yes, please provide evidence such as a receipt from the donee organization, a canceled check, or record of payment, to substantiate all contributions made.
- Did you donate a vehicle or boat during the year?
- Did you pay real estate taxes for your primary home and/or second home?
- Did you pay any mortgage interest on an existing home loan?
- Did you incur interest expenses associated with any investment accounts you held?
- Did you make any major purchases during the year (cars, boats, etc.)?
- Did you make any out-of-state purchases (by telephone, internet, mail, or in person) for which the seller did not collect state sales or use tax?

## Miscellaneous Information

- Did you make gifts of more than \$16,000 to any individual?
- Did you utilize an area of your home for business purposes?
- Did you engage in any bartering transactions?
- Did you retire or change jobs this year?
- Did you incur moving costs because of a permanent change of station as a member of the Armed Forces on active duty?
- Did you pay any individual as a household employee during the year?

OVER

# 2022

- Did you make energy efficient improvements to your main home this year?
- Did you receive a distribution from, or were you a grantor or transferor for a foreign trust?
- Did you have a financial interest in or signature authority over a financial account such as a bank account, securities account, or brokerage account, located in a foreign country?
- Do you have any foreign financial accounts, foreign financial assets, or hold interest in a foreign entity?
- Did you receive correspondence from the State or the IRS?
- If yes, explain: \_\_\_\_\_
- Do you have previous years of tax returns that are either unfiled or filed with unpaid balances due?
- Do you want to designate \$3 to the Presidential Election Campaign Fund? If you check yes, it will not change your tax or reduce your refund.

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature