



Must complete and include with your 2022 Tax Return Paperwork

NAME:

ADDRESS: (If Different)

PHONE:

1) Banking info for Direct Deposit of Refund

Circle one:

Checking

or

Savings

Routing

Acct #

2) Return Signatures will be done Electronically must provide updated Email Address

EMAIL:

EMAIL Spouse:

3) How much did you contribute to Charity in 2022?

\$

New law allows deduction even if you don't itemize

Must Include Proof

4) Did you receive *Unemployment* in 2022?

YES

NO

Print 1099G from NYS Unemployment Website

5) Did you pay *Student Loan Interest* in 2022?

YES

NO

Print 1098 E from Student Loan Website

6) Did you pay for *Child Care* for dependant in 2022?

YES

NO

Please Provide statement from Daycare facility

7) Did you pay *College Tuition* in 2022?

YES

NO

Print 1098 T from School Website

8) Did you pay *Property Taxes* on Primary Home in 2022?

YES

NO

Include all paid Property Tax Bills. New Credit

9) Did you install Energy Efficient Products in 2022?

YES

NO

Include paid receipts (Windows, Doors, Furnace, Insulation, Boiler, Solar, etc) Appliances Don't Qualify

10) If Taxpayer or Spouse, New Drivers License in 2022, include Front and Back copy

Anything we should be aware of or any questions you would like to discuss.

