

2022 Tax Filing Information

Today's date: _____

Taxpayer's name:	Spouse's Name:
SS#:	SS#:
Date of Birth:	Date of Birth:
Phone#:	Phone#:
Email address:	Email address:
Address:	

Filing status:

*Single
 Married, filing jointly
 Married, filing separately
 Head of Household

***If filing single, and you had any biological children or parents who lived with you for more than six months of 2022, you MAY qualify to file as Head of Household. Please consult with your tax preparer.**

- 1) Did you purchase health insurance from the marketplace in 2022? yes no
- 2) Did you take a COVID-19 retirement withdrawal in 2020? yes no
- a) If yes to #2 above, did you take income over the three years allowed? yes no
- 3) Did you receive any unemployment benefits in 2022? yes no

Do you want to purchase the Audit Protection Program? Yes No

Do you want an organizer sent to you for your 2023 taxes? Yes No mail email

Bank information for direct deposit: Checking Savings

If you do not write this information down, your refund will be mailed to you.

Routing#: _____ Account#: _____

Signatures:

Taxpayer: _____ Spouse: _____