

# 2022 PERSONAL TAX DEDUCTION WORKSHEET

## CONTACT INFORMATION

Name \_\_\_\_\_ Spouse Name \_\_\_\_\_  
 Address \_\_\_\_\_ Address \_\_\_\_\_  
 \_\_\_\_\_  
 D.O.B. \_\_\_/\_\_\_/\_\_\_ SS# \_\_\_\_\_ D.O.B. \_\_\_/\_\_\_/\_\_\_ SS# \_\_\_\_\_  
 Occupation \_\_\_\_\_ Occupation \_\_\_\_\_  
 Preferred contact person? Y or N Preferred contact person? Y or N  
 Phone Home /Cell \_\_\_\_\_ Phone Home /Cell \_\_\_\_\_  
 Email Address \_\_\_\_\_ Email Address \_\_\_\_\_

Do you want direct deposit if you have a refund? (Please include a voided check) Y or N

Please answer Yes or No to <u>ALL</u> questions in this box.	YES	NO
Does your family have Marketplace health insurance? If yes, we need Form 1095-A		
Do you have any income from a Foreign Country or any Foreign Accounts?		
Do you have any income from a source that you did not receive a W-2 or 1099? If yes, please detail.		
Did you or your dependents receive, sell, send, or exchange any <b>virtual currency</b> during 2022?		
Do you have any dependents that lived with you for over 6 months? Could anyone else claim this child? Y or N Please fill out worksheet on page 3 for all children that you can claim.		
Did you pay anyone for childcare expenses? If yes, fill out worksheet on page 3.		
Did you or any of your dependents have education expenses? If yes, fill out worksheet on pg 3.		
Did your children attend private elementary or high school in WI? (WI deduction)		
Did you foreclose, file bankruptcy, or have repossession procedures?		
Do you receive any Disability income?		
Did you pay or receive Alimony? If yes, what date was the divorce final? _____		
Did you convert a traditional/SEP/SIMPLE IRA to a Roth IRA? If yes, attach form 1099-R.		
Did you make any catalog or internet purchases and not pay WI sales tax? If yes, total amount _____ x \$.055 = \$ _____		

## SIGNATURE – PLEASE SIGN

I (we) certify that all the information listed is correct and complete,  
 and may be relied upon to prepare my income tax returns.

\_\_\_\_\_  
 (Taxpayer's Signature) (Date)  
 \_\_\_\_\_  
 (Spouse's Signature) (Date)

**2022 PERSONAL TAX DEDUCTION WORKSHEET** Name: \_\_\_\_\_

**ESTIMATED TAXES PAID (not withholding from wages/pensions)**

DATE	FEDERAL	STATE-_____	STATE-_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
TOTAL	_____	_____	_____

**IRA/ROTH/SEP CONTRIBUTIONS**

[not deducted from paycheck] *Individual* \_\_\_\_\_ *Spouse* \_\_\_\_\_

Contributions for 2022 \$ \_\_\_\_\_ \$ \_\_\_\_\_

Circle Type: IRA ROTH SEP/SIMPLE IRA ROTH SEP/SIMPLE

**HEALTH SAVINGS ACCOUNTS**

	<i>Individual</i>	<i>Spouse</i>	Were all distributions used to pay for qualified medical expenses?
Contributions	\$ _____	\$ _____	
Distributions	\$ _____	\$ _____	Y or N Initial _____

**ITEMIZED DEDUCTIONS**

<p>➤ <b>Medical/Dental Expenses</b></p> <p>Insurance premiums _____ (NOT pre-tax from work)</p> <p>Medicare Premiums _____</p> <p>Long-term care premiums _____</p> <p>Medical miles driven _____</p> <p>Out-of-pocket expenses for Doctors/Dentists/Meds/Eyecare (NOT paid from HSA) _____</p> <p>➤ <b>Taxes</b></p> <p>Home Real Estate _____</p> <p>Other _____</p> <p>➤ <b>Home Mortgage Interest</b></p> <p>Paid-Financial Institutions \$ _____</p> <p>Paid-Individuals \$ _____</p> <p>Name _____</p> <p>Address _____</p> <p>SS# _____</p>	<p>➤ <b>Rent Expense</b></p> <p>Do you rent your personal residence? Y or N</p> <p>Rental 1: How much? \$ _____ /mo x _____ months= \$ _____</p> <p>Rental 2: How much? \$ _____ /mo x _____ months= \$ _____</p> <p>Total 2022 Rent: \$ _____</p> <p>Was heat included? Rental 1: Y or N Rental 2: Y or N</p> <p>➤ <b>Contributions</b> Cash \$ _____ Non Cash \$ _____</p> <p>Do you have receipts or cancelled checks for each contribution? Y or N Initial _____</p> <p>Mileage for charitable work _____</p> <p>➤ <b>Miscellaneous Deductions</b></p> <ul style="list-style-type: none"> <li>• Tax preparation fees \$ _____</li> <li>• Gambling losses \$ _____ (Only up to amount of gambling winnings)</li> <li>• K-12 Teacher out-of-pocket expenses for supplies &amp; books (up to \$300) \$ _____</li> </ul> <p>➤ <b>Student loan Interest (Form 1098-E)</b></p> <p>Amount Paid \$ _____</p>
--	--

**2022 PERSONAL TAX DEDUCTION WORKSHEET** Name: \_\_\_\_\_

**RESIDENTIAL ENERGY CREDITS**

Residential energy efficient property including solar, wind, geothermal and fuel cell – Bring in paperwork.

Amount paid in 2022 \$ \_\_\_\_\_

Type of improvement? \_\_\_\_\_

*No lifetime limit on this credit*

Residential energy efficient improvements to your personal residence including insulation, windows, furnaces, etc

Amount paid in 2022 \$ \_\_\_\_\_

Type of improvement? \_\_\_\_\_

Have you claimed this credit for any improvements in any year since 2005?

If yes, how much? \_\_\_\_\_

*This credit is limited on how much can be claimed in your lifetime.*

**DEPENDENTS**

Full Name	Relationship	Date of Birth	Social Security Number	Months Living with You In 2022	Can Anyone Else Claim This Dependent?	College Student (if yes, see table below)	Gross Income Earned During 2022	Health Insurance All Year
<i>Ex: Joseph J Johnson</i>	<i>Son</i>	<i>1/1/1991</i>	<i>123-45-6789</i>	<i>8</i>	<i>No</i>	<i>Yes</i>	<i>\$2500</i>	<i>X</i>

**CHILD DAYCARE CREDIT**

Child Name	Provider Name & Address	SS#/FEIN	Amount Paid
_____	_____	_____	_____
_____	_____	_____	_____

**EDUCATION CREDIT- FORM 1098-T REQUIRED FROM EACH SCHOOL FOR CREDIT**

Student Name	Student Name	Student Name
Did student complete first 4 years of post-secondary education before 2022?  Yes      No	Did student complete first 4 years of post-secondary education before 2022?  Yes      No	Did student complete first 4 years of post-secondary education before 2022?  Yes      No
Has the student ever been convicted of a felony for possession or distribution of a controlled substance?  Yes      No	Has the student ever been convicted of a felony for possession or distribution of a controlled substance?  Yes      No	Has the student ever been convicted of a felony for possession or distribution of a controlled substance?  Yes      No