

SKYTAXES 2022 Income Tax Organizer

Personal Information										
First Name	M.I.	Last Name	Social Security Number	Date of Birth						
Taxpayer:										
Driver's License #		State of Issued		Issue Date		Exp. Date				
Spouse:										
Driver's License #		State of Issued		Issue Date		Exp. Date				
Occupation			Employer				Base			
Taxpayer:										
Spouse:										
Street Address				Apt.#	City			State	Zip Code	
Filing Address:										
Mailing Address:										
Cell Phone Number			Home Phone Number			Email				
Taxpayer:										
Spouse:										
Filing Status										
<input type="checkbox"/> Single		<input type="checkbox"/> Married Filing Joint			<input type="checkbox"/> Qualifying Widow(er) Spouse's Date of Death					
<input type="checkbox"/> Married Filing Separate <i>If you file MFS and itemize your deductions your spouse must also itemize their deductions as well</i>		Spouse Name:			Spouse Soc. Sec. #:					
		Did you live with your spouse any time during 2022?					<input type="checkbox"/> Yes		<input type="checkbox"/> No	
		If yes, did you live with your spouse any time after June 30 th ?					<input type="checkbox"/> Yes		<input type="checkbox"/> No	
<input type="checkbox"/> Head of Household <i>If you are the custodial parent and someone else is taking the exemption for your child, complete this section.</i>		Name:			Soc. Sec. #:					
		Relationship:	Date of Birth:		Number of months lived with you:					
		Who is claiming this person on their return?								
Dependent Information										
<i>To have a qualifying dependent, income must be under \$2200 unless they are a full-time student under the age of 24.</i>										
Name	DOB	SSN	Relationship	Months at home	Full Time Student	Disabled				
						<input type="checkbox"/> Yes <input type="checkbox"/> No		<input type="checkbox"/> Yes <input type="checkbox"/> No		
						<input type="checkbox"/> Yes <input type="checkbox"/> No		<input type="checkbox"/> Yes <input type="checkbox"/> No		
						<input type="checkbox"/> Yes <input type="checkbox"/> No		<input type="checkbox"/> Yes <input type="checkbox"/> No		
						<input type="checkbox"/> Yes <input type="checkbox"/> No		<input type="checkbox"/> Yes <input type="checkbox"/> No		

SKYTAXES

Gateway I

3663 N. Sam Houston Pkwy E Suite 600

Houston, TX 77032

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Dependent Information - Continued						
					<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
					<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
					<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Life Events - Please check all that apply for 2022						
<input type="checkbox"/> Marriage Divorce/Separation		<input type="checkbox"/> Adoption		<input type="checkbox"/> Own rental property		
<input type="checkbox"/> Retirement (IRA, 401K) withdrawals		<input type="checkbox"/> Purchased a home		<input type="checkbox"/> Made home energy efficient improvements		
<input type="checkbox"/> Own or started a business		<input type="checkbox"/> Sold stock		<input type="checkbox"/> Foreign earned income		
Virtual Currency						
At any time during 2022, did you buy, sell, send, or exchange any virtual currency? <input type="checkbox"/> Yes <input type="checkbox"/> No						
Income - Please provide applicable Forms W2 and 1099						
Interest Income: Form 1099-INT or Dividend Income: Form 1099-DIV					<input type="checkbox"/> Yes <input type="checkbox"/> No	
Sale of Stock or Bonds- please include <u>complete</u> purchase and sale information: Form 1099-B					<input type="checkbox"/> Yes <input type="checkbox"/> No	
Retirement Plan Income: Form 1099-R					<input type="checkbox"/> Yes <input type="checkbox"/> No	
Unemployment Compensation: Form 1099-G					<input type="checkbox"/> Yes <input type="checkbox"/> No	
Social Security Benefits: Form SSA-1099 or RRB-1099					<input type="checkbox"/> Yes <input type="checkbox"/> No	
State or Local Refund Received: Form 1099-G, Itemized on your 2021 return? <input type="checkbox"/> Yes <input type="checkbox"/> No					<input type="checkbox"/> Yes <input type="checkbox"/> No	
Alimony Received: How much? \$ Date of the original divorce/separation agreement?					<input type="checkbox"/> Yes <input type="checkbox"/> No	
K-1 from a Corporation, Estate, Trust, Partnership, etc.?					<input type="checkbox"/> Yes <input type="checkbox"/> No	
Collection of Debt: 1099-C					<input type="checkbox"/> Yes <input type="checkbox"/> No	
Gambling Winnings! Form W2-G					<input type="checkbox"/> Yes <input type="checkbox"/> No	
Business Income: 1099-MISC. Please provide 1099-MISC and complete schedule "C" to the best of your ability. We will contact you for further information and details of your business expenses.					<input type="checkbox"/> Yes <input type="checkbox"/> No	
Royalty Income: 1099-MISC.					<input type="checkbox"/> Yes <input type="checkbox"/> No	
Rental Income: Please attach Schedule "E" (available on our website) with preliminary notes for us to work with. We will contact you for further information.					<input type="checkbox"/> Yes <input type="checkbox"/> No	
Estimated or Quarterly Tax Payments paid in 2022 <input type="checkbox"/> Yes <input type="checkbox"/> No (made directly to the IRS usually for self-employment/investment income, not from your W2) \$						
Alimony						
Date of original divorce/separation agreement:						
Alimony Paid \$		Recipient's Name:			SSN:	
IRA Contributions						
Taxpayer	\$				<input type="checkbox"/> Roth <input type="checkbox"/> Traditional	
Spouse	\$				<input type="checkbox"/> Roth <input type="checkbox"/> Traditional	

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Educational Deductions & Student Loan Interest

 Student Loan Interest Paid- *Please provide Form 1098-E*
 Tuition Paid- *Please provide Form 1098-T*

	Name	Name	Name
Years in College	<input type="radio"/> 1 st <input type="radio"/> 2 nd <input type="radio"/> 3 rd <input type="radio"/> 4 th <input type="radio"/> Grad	<input type="radio"/> 1 st <input type="radio"/> 2 nd <input type="radio"/> 3 rd <input type="radio"/> 4 th <input type="radio"/> Grad	<input type="radio"/> 1 st <input type="radio"/> 2 nd <input type="radio"/> 3 rd <input type="radio"/> 4 th <input type="radio"/> Grad
Was student at least halftime?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

Medical Expenses & Accounts

Health Savings Accounts (HSA) Forms 5498-SA or 1099-SA Please provide forms

HSA Coverage Self Only Family

Please provide Health Insurance Coverage 1095-A if you have coverage via the Marketplace

Medical Expenses

Medical Expenses must exceed 7.5% of your income. Do not include amounts paid by insurance or with pre-tax dollars

Medical miles driven:	Optometry Contacts and Glasses: \$
Doctors, Dentist, & Hospitals: \$	Prescription Medicine: \$

Health Care Tax Credit Yes No Please provide Form 8885 or 1099-H if eligible

Moving Expenses for Active-Duty Military ONLY

Date of Move:	<i>*Move must be of primary residence more than 50 miles and job related*</i>
Miles from new home to job:	Miles from old home to job:
Miles Driven:	Lodging Expenses: \$
Moving Supplies & Rentals: \$	Reimbursement <input type="checkbox"/> YES <input type="checkbox"/> NO

Home Ownership (provide 1098-Mort forms)

Mortgage Interest:	Property Taxes:
Points Paid:	PMI Insurance:

Sales Tax

**The IRS allows a preset amount be included based on your income, however your number might be higher especially if it was a year of big purchases*

Sales tax paid on a car, boat, RV, or aircraft in 2022: \$
Total sales tax paid on ALL purchases in 2022: \$ <i>Optional</i>

Charitable Contributions

** Regardless of the amount, to deduct a contribution of cash, check, or other monetary gift, you must maintain a bank/ payroll deduction record or a written communication from the organization. Containing the name of the organization, the date and amount of the contribution. Please provide receipts.*

Cash Contribution Amount: \$	Charitable miles driven:
Non-Cash Contribution Amount: \$	<i>goodwill, purple heart, or salvation army it all counts!</i>

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Casualty Theft & Loss						
Type Of Property	Reason for Damage	Date of Event	Date Acquired	Value before loss or damage	Value after loss or Damage	Insurance Reimbursement
Miscellaneous Expenses						
Safety deposit box rental: \$			Educator Expenses: \$			
Margin or Investment interest paid/Fees: \$			Personal property taxes: \$			
Tax preparation Fees: \$			Tax preparation books or software: \$			
Unreimbursed Employee Expenses						
Eliminated for tax years 2018 through 2025 due to FEDERAL tax reform. Employee deductions are still available for AL, AR, CA, HI, MN, NY, and PA. Talk to us about what is deductible.						
Child Care Expenses						
Dependent Care Benefits through employer: <input type="checkbox"/> Yes <input type="checkbox"/> No			<i>*Child must be under the age of 13, exception applies for qualifying adult.</i>			
Provider	Address	Tax ID or SS#	Childs Name	Amount		
Energy Efficient Improvements						
<i>*You may be able to take a credit of up to 30% of your costs of qualified solar electric property, solar water heating property, small wind energy property, geothermal heat pump property, and fuel cell property. Include any labor costs properly allocable to the onsite preparation, assembly, or original installation of the residential energy efficient property and for piping or wiring to interconnect such property to the home.</i>						
Energy Efficient Improvements <input type="checkbox"/> Yes <input type="checkbox"/> No Please Explain:						
Filing Instructions						
Would you like to electronically file your return? <input type="checkbox"/> Yes It's FREE, safe, and the quickest way to receive your refund *If yes please fill out Form 8879* <input type="checkbox"/> No *\$20 additional fee* Skip Form 8879. Sign and date return upon arrival and mail to the appropriate agencies.						
Would you like direct deposit? <input type="checkbox"/> Yes, It's FAST & FREE!!! Bank Name: _____ <input type="checkbox"/> Checking <input type="checkbox"/> Savings Routing Number#: _____ Account #: _____ <input type="checkbox"/> No, your refund will be mailed to your filing address in approximately 3-6 weeks after it has been accepted.						

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Additional Comments:

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