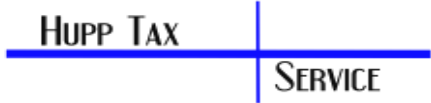


What to Bring



tax year 2022 www.hupptax.com

32341 Vine Street, Willowick, OH 44095 ph: 440.944.4343 fax 440.944.4341 email: taxhelp@hupptax.com

Please Bring:

Name: _____

- Anything marked "Important Tax Document"
- W2s, 1099s, etc. (showing income)
- 1098s & 1099s (showing deductions, payments, etc.)
- 1098-T for students. (REQUIRED for education credits)
- 1095-A (Marketplace health insurance)
- Prior year tax return (if not prepared by Hupp Tax)

Changes during 2022:

Moved (when?) _____

Moved (where?) _____

Did you get (circle) : Married/Divorced/Separated?

If so, when? _____

New Dependent? Include name, relation, DOB & SSN

Key Changes for tax year 2022

- Business meals at a restaurant are 100% deductible in 2021 and 2022 (was 50%)
- Energy Credit reinstated for 2022, and will be even better in 2023. (windows, doors, solar, geothermal, etc.)
- Clean Vehicle Credit for purchase of electric vehicles, rules changed 8/16/22, more coming for 2023.
- Child Tax, Child Care and Earned Income credit reduced from 2021 amounts to old rules.

- Quarterly Estimates** (please specify if any amounts below were applied from prior year)

	Quarter 1	Quarter 2	Quarter 3	Quarter 4	Total
Federal payments					\$
Ohio payments					\$
City (RITA, CCA, Geneva, etc)					\$

- Self-Employed** - summarize income & expenses (see enclosed worksheet or hupptax.com)
- Rental Property** - summarize income & expenses (see enclosed worksheet or hupptax.com)

Common Tax Breaks - (continued on back)

<input type="checkbox"/> College Tuition - The student's 1098-T is REQUIRED.	
Other required educational fees, BOOKS	\$

<input type="checkbox"/> New(ish) Ohio credits:	(see list of qualifying NCNP schools at hupptax.com/resources)
Nonchartered/nonpublic (NCNP) tuition paid (excludes most Catholic schools)	\$
Scholarship Donation Credit \$750 (see list of qualifying funds)	
Homeschool expenses (books, supplies, software only, NO electronics or PCs)	\$

Common Tax Breaks (continued)

- Health Savings Accounts (HSA)** - Please include the 1099-SA.

Amount contributed (max. \$3,650 Single, \$7,300 family, add'l \$1,000 catch up if over 55)	\$
Was any HSA distribution NOT used for qualified medical expenses?	non-medical amount \$

- IRA contributions** - max. \$6,000 (\$7,000 if > 50)

	Owner	Amount	Owner	Amount
Traditional		\$		\$
Roth		\$		\$

- Child & Dependent Care Credit** - Expenses paid for day care in order to work or attend school

Provider Tax ID, Name & address:	
Amount spent per child: child name _____	Amount \$ _____

- Medical Expenses** - Total expense must be over 7.5% of AGI before any deduction.

****If medical exceeds 7.5%, it can help on the Ohio return, even if it doesn't on the Federal return.*

Health Ins. premiums (not through payroll)	\$		
Prescriptions	\$		
Dentists, Doctors	\$		
Hospitals, Labs	\$	Other	\$
Long Term Care Insurance	\$	Other	\$
Eyecare: Contacts, glasses	\$	Miles driven for medical	

Itemized Deductions - Itemizing will help if deductions are more than your standard deduction.

Standard deduction amounts: Single \$12,950, Married \$25,900, Head of Household \$19,400

- additional standard deduction of \$1,750 (single) or \$1,400 (MFJ, HOH) if 65+ years and/or blind.

- Mortgage Interest & Property Taxes**

Please note amount paid (unless already included on form 1098.)	Interest	Property Taxes
	\$	\$

- Charitable donations** - IRS requires receipts for ALL donations

Cash/Check Donations

Church	\$
Other	\$
Other	\$

Non-Cash Donations *

Goodwill	\$
Purple Heart	\$
Other	\$

* If over \$500, additional detail required; itemized list, value, etc

- Gambling losses** (not to exceed gambling winnings)

\$

Answer: The first Form 1040 was introduced in 1913, with a 1% tax on income above \$3,000 and 6% tax above \$500,000.