FISHER, P.A. TAX ORGANIZER

1108 East Boulevard | Charlotte, NC 28203 | 704-332-7800 | fisheraccountants.com

This tax organizer is designed to help you gather the tax information needed to prepare your 2022 personal income tax return. Please fill out all 2022 information on the tax organizer pages provided.

Who is the primary contact? ☐ Taxpayer ☐ Spouse
How do you prefer to be contacted? ☐ Phone ☐ Email

TAXPAYER INFORMATION

☐ Check box if all contact information is the same as prior year:

Legal name:
Date of birth:
Goes by:
Occupation:
Email:
Mobile #: primary ☐
Work #: primary ☐
Home #: primary ☐
Driver's license #:

SPOUSE INFORMATION

☐ Check box if all contact information is the same as prior year:

Legal name:
Date of birth:
Goes by:
Occupation:
Email:
Mobile #: primary ☐
Work #: primary ☐
Home #: primary ☐
Driver's license #:

Address: City: State: Zip:
Mailing address (if different): City: State: Zip:
Marital status (check one): ☐ Married ☐ Single ☐ Widow(er) Date of spouse's death:
Will file jointly? .... ☐ Yes ☐ No
Did you get married to a same-sex spouse in a state that legally recognizes same-sex marriage? ... ☐ Yes ☐ No
Can you be claimed as a dependent by another taxpayer? .... ☐ Yes ☐ No
Did any of the taxpayers become legally blind or disabled during the year? .... ☐ Yes ☐ No
If yes, please explain:

TAX REFUNDS/PAYMENTS

If you are getting a tax refund, would you like it to be direct deposited into your bank account? ... ☐ Yes ☐ No
If you want direct deposit or payment of your taxes from your bank account, please provide:
Financial institution name:
Routing number:
Account number:
Account type: ☐ Checking ☐ Savings
Account owner: ☐ Joint ☐ Taxpayer ☐ Spouse

To help avoid errors, we strongly suggest you provide us a copy of a voided check.
You will have a chance to review your return first.
If you owe tax, do you want the funds electronically withdrawn from your bank account? .... ☐ Yes ☐ No
If yes, on April 15th ☐ or another date?

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DEPENDENT INFORMATION

Name (First, Last)	Relationship	Date of birth	Months lived with you	Disabled	Full time student	Dependent's earned gross income

If you are divorced or separated with child(ren), do you have a divorce decree or other form of separation agreement which establishes custodial responsibilities? ☐ Yes ☐ No

Do you have any children under age 19 or a full-time student under age 24 with **unearned** income in excess of $2,300 (interest, dividends, capital gains)? ☐ Yes ☐ No

Did you pay any expenses related to the adoption of a child during the year? ☐ Yes ☐ No

Did you provide over half the support for any other person(s) other than your dependent children during the year? ☐ Yes ☐ No

Did you pay for child care while you worked, looked for work, or while a full-time student? ☐ Yes ☐ No

If yes, answer child care provider information below. *Camps qualify*

Child care provider	Dependent name	Street address	City	State	Zip	Employer Tax ID #	Amount paid

PURCHASE, SALES AND DEBT INFORMATION
PLEASE ANSWER ALL QUESTIONS AND ATTACH ANY REQUESTED DOCUMENTS.

Did you start a new business during the year? ☐ Yes ☐ No
(Answer questions in the income section regarding businesses)

Did you purchase rental property during the year? ☐ Yes ☐ No

- ☐ Attach HUD/Settlement statement

Property address:

(Answer question in the income section regarding rental properties)

Did you acquire a new or additional interest in a Partnership or S Corporation? ☐ Yes ☐ No

- ☐ Attach K-1 Schedules

Did you sell, exchange or purchase any real estate during the year? ☐ Yes ☐ No

- ☐ Attach closing statement/HUD-sale of property
- ☐ Attach closing statement/HUD-purchase of property
- ☐ Attach list of additions/improvements while you owned the property
- ☐ Attach proceeds from real estate transactions if applicable (Form 1099-S)

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PURCHASE, SALES AND DEBT INFORMATION (CONT'D)

Did you purchase or sell a principal residence during the year? ☐ Yes ☐ No

- ☐ Attach closing statement/HUD-sale of property
- ☐ Attach closing statement/HUD-purchase of property
- ☐ Attach mortgage interest statement (Form 1098)
- ☐ Attach proceeds from real estate transactions if applicable (Form 1099-S)

Did you foreclose or abandon a principal residence or real property during the year? ☐ Yes ☐ No

Did you acquire or dispose of any stock during the year? ☐ Yes ☐ No

- ☐ Attach stock sale information (Form 1099-B)

Did you take out or do you already have a home equity loan? ☐ Yes ☐ No

Did you use the proceeds for home improvements? ☐ Yes ☐ No

Did you refinance a principal residence or second home this year? ☐ Yes ☐ No

- ☐ Attach closing statement/HUD

Did you sell an existing business, rental or other property this year? ☐ Yes ☐ No

Please explain:

Did you lend money with the understanding of repayment and this year it became totally uncollectable? ☐ Yes ☐ No

Did you have any debts canceled or forgiven this year, such as a home mortgage or student loan? ☐ Yes ☐ No

- ☐ Attach cancellation of debt (Form 1099-C) or acquisition or abandonment of Secured Property (Form 1099-A)

Did you purchase a qualified plug-in electric drive vehicle or qualified fuel cell vehicle this year? ☐ Yes ☐ No

INCOME INFORMATION: PLEASE ANSWER ALL QUESTIONS AND ATTACH ANY APPLICABLE DOCUMENTS.

- ☐ Wages: Form W-2 (we suggest you provide the last paycheck stub as well)
- ☐ Interest income: Form 1099-INT
- ☐ Dividend and distributions: Form 1099-DIV
- ☐ Stock sale information/Capital gains: Form 1099-B (Brokerage statements)
- ☐ State/local tax refunds: Form 1099-G
- ☐ Alimony received
- ☐ Jury duty income
- ☐ Bartering income: Form 1099-B
- ☐ Nonemployee Compensation: Form 1099-NEC
- ☐ Other Income: Form 1099-MISC

Did you receive any income from property sold prior to this year (such as property sold as an installment agreement or owner financed)? ☐ Yes ☐ No

Did you receive any unemployment benefits during the year? ☐ Yes ☐ No

- ☐ Attach certain government payments (Form 1099-G)

Did you receive any disability income during the year? ☐ Yes ☐ No

Did you receive tip income not reported to your employer this year? ☐ Yes ☐ No

Did any of your life insurance policies mature, or did you surrender any policies? ☐ Yes ☐ No

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INCOME INFORMATION (CONT'D)

Did you receive any awards, prizes, hobby income, gambling or lottery winnings? .... ☐ Yes ☐ No

- ☐ Attach gambling income (Form W-2G)
- ☐ Attach total of gambling expenses

Gambling losses: ☐ $ ______ Description: ______

Did you run a business that is included on your personal tax return as a schedule C? .... ☐ Yes ☐ No

- ☐ Attach business Income: Attach form 1099-NEC (Nonemployee compensation) and income items not included on the form
- ☐ Attach business expenses: Provide a list of business expenses or request a business expenses template by emailing csc@fisheraccounts.com. Please reference prior year tax return for list of expenses that were used previously.
- ☐ Did you sell, exchange or purchase any assets used in your trade or business? .... ☐ Yes ☐ No

Did you earn income from a rental property? .... ☐ Yes ☐ No

- ☐ Attach rental income: Miscellaneous information (form 1099-MISC) and income items not included on the form.
- ☐ Attach rental expenses: Provide a list or request a rental expenses template by emailing csc@fisheraccountants.com. Please reference prior year tax return for list of expenses that were used previously.

Did you receive a Form 1099-K, 1099-MISC, 1099-NEC or other income statement for work done in what is commonly referred to as the "gig" economy? .... ☐ Yes ☐ No

Did you receive any Medicaid waiver payments as difficulty of care during the year? .... ☐ Yes ☐ No

FOREIGN INCOME: PLEASE BE AWARE THERE ARE VERY STRICT FOREIGN FILING REQUIREMENTS THAT COULD REQUIRE ADDITIONAL FILINGS

Are the foreign taxes paid reported on a brokerage statement? .... ☐ Yes ☐ No

Did you have any foreign income or pay any foreign taxes during the year, directly or indirectly, such as from investment accounts, partnerships or a foreign employer? .... ☐ Yes ☐ No

Did you receive a distribution from, or were you a grantor or transferor for a foreign trust? .... ☐ Yes ☐ No

Did you have a financial interest or signature authority over a financial account such as a bank account, securities account or brokerage account, located in a foreign country? .... ☐ Yes ☐ No

Please explain: ______

Do you have foreign financial accounts, foreign financial assets or hold interest in a foreign entity? Examples of foreign assets are: foreign stocks or securities, foreign partnership investments, foreign-issued life insurance or foreign pensions .... ☐ Yes ☐ No

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RETIREMENT INFORMATION

What retirement accounts do you have (ex. SEP, 401k, Roth IRA etc.)?

What are your contribution preferences (max out etc.)?

Did you make any withdrawals from an IRA, Roth, Keogh, Simple, SEP, 401(k) or other qualified retirement plan?

Taxpayer: ☐ Yes ☐ No Spouse: ☐ Yes ☐ No

☐ Attach distributions from pensions, annuities, retirement or profit-sharing plans, IRAs, insurance contracts, etc. (Form 1099-R). If yes, were any withdrawals due to a federally declared disaster? .... ☐ Yes ☐ No

Did you make any contributions to an IRA, Roth, Keogh, SIMPLE, SEP, 401(k) or other qualified retirement plan?

Taxpayer: ☐ Yes ☐ No Spouse: ☐ Yes ☐ No

☐ Attach IRA contribution form (Form 5498)

Are you an active participant in a pension or retirement plan?

Taxpayer: ☐ Yes ☐ No Spouse: ☐ Yes ☐ No

Did you receive Social Security benefits?

Taxpayer: ☐ Yes ☐ No Spouse: ☐ Yes ☐ No

☐ Attach Social Security benefit statement (Form SSA-1099)

Did you receive Railroad Retirement?

Taxpayer: ☐ Yes ☐ No Spouse: ☐ Yes ☐ No

☐ Attach Railroad benefits (Form RRB-1099)

Did you receive any lump-sum payments from a pension, profit sharing or 401(k) plan?

Taxpayer: ☐ Yes ☐ No Spouse: ☐ Yes ☐ No

Have you received notification of Required Minimum Distributions?

Taxpayer: ☐ Yes ☐ No Spouse: ☐ Yes ☐ No

EDUCATION INFORMATION

Did you, your spouse or your dependents attend a post-secondary school during the year, or plan to attend one in the coming year? .... ☐ Yes ☐ No

☐ Attach tuition statement (Form 1098-T)

Did you have educational expenses during the year for yourself, spouse, or a dependent? .... ☐ Yes ☐ No

Textbooks: $ Parking: $ Supplies: $ Computer & Software: $ Other: $

Did anyone in your family receive a scholarship of any kind during the year? .... ☐ Yes ☐ No

☐ Attach tuition statement (Form 1098-T)

Did you pay any student loan interest this year? .... ☐ Yes ☐ No

☐ Attach student loan interest statement (Form 1098-E)

Did you cash any Series EE or I U.S. Savings bonds issued after 1989? .... ☐ Yes ☐ No

☐ Attach interest income (Form 1099-INT)

Did you make any withdrawals from an education savings or 529 plan account? .... ☐ Yes ☐ No

☐ Attach payments from qualified education programs (Form 1099-Q)

Did you make any contributions to an education savings or 529 plan account? .... ☐ Yes ☐ No

Amount: $

Did you have teacher/educator classroom expenses? .... ☐ Yes ☐ No

Amount: $

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HEALTH CARE INFORMATION

Did you have qualifying health care coverage, such as employer-sponsored coverage or government-sponsored coverage (i.e. Medicare/Medicaid) for every month of 2022 for your family? Your family for health care coverage refers to you, your spouse if filing jointly and anyone you can claim as a dependent. ...... ☐ Yes ☐ No

☐ Attach form 1095

Did you enroll for lower cost Marketplace Coverage through healthcare.gov under the Affordable Care Act? .... ☐ Yes ☐ No

☐ Attach the health insurance marketplace statement (Form 1095-A)

Did you enroll for lower cost Marketplace Coverage through healthcare.gov under the Affordable Care Act and share a policy with anyone who is not included in your family? .... ☐ Yes ☐ No

Did you make any contributions to a health savings account (HSA) Archer MSA or Medicare Advantage MSA this year? .... ☐ Yes ☐ No

☐ Attach contributions from HSA, Archer MSA or Medicare Advantage MSA (Form 5498-SA)

Did you make any distributions to a health savings account (HSA) Archer MSA or Medicare Advantage MSA this year? .... ☐ Yes ☐ No

☐ Attach distributions from HSA, Archer MSA or Medicare Advantage MSA (Form 1099-SA)

Did you pay long-term care premiums for yourself or your family? .... ☐ Yes ☐ No

Amount: $

If you are a business owner, did you pay health insurance premiums for you and your family? ...... ☐ Yes ☐ No

Amount: $

Did you make any contributions to an ABLE (Achieving a Better Life Experience) account? .... ☐ Yes ☐ No

☐ If yes, attach any Form(s) 5498-QA you received

Did you receive any withdrawals from an ABLE (Achieving a Better Life Experience) account? .... ☐ Yes ☐ No

☐ If yes, attach any Form(s) 1099-QA you received

Did you receive any Health Coverage Tax Credit (HCTC) advance payments? .... ☐ Yes ☐ No

☐ If yes, attach any Form(s) 1099-H you received

ITEMIZED DEDUCTIONS

MEDICAL EXPENSES

Medical, dental and vision insurance premiums (paid by you after tax) .... $

Prescription drugs .... $

Out of pocket medical expenses not reimbursed by insurance (co-pays, hospital/clinic, glasses, hearing aids, etc. .... $

Miles driven for medical purposes .... $

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CHARITABLE CONTRIBUTIONS

Total donations made by cash, check or credit card .... $

☐ Attach a list and provide receipts for all donations

Miles driven for volunteer work ....

Total amount of non-cash donations .... $

For non-cash donations, you must provide a spreadsheet and all donation receipts.
For an additional copy, please email csc@fisheraccountants.com

Did you donate a vehicle or boat during the year? .... ☐ Yes ☐ No

☐ If yes, attach the contribution of motor vehicles, boats and airplanes (form 1098-C) or other written acknowledgment from the donee organization.

Did you donate stock during the year? .... ☐ Yes ☐ No

TAXES PAID

Did you have state taxes paid for prior years (such as balances owed on an installment amt)? .... ☐ Yes ☐ No

Did you make any out-of-state purchases (by telephone, internet, mail or in person) for which the seller did not collect state sales tax or use tax? .... ☐ Yes ☐ No

Real estate taxes (provide bills) .... $

Personal property tax (provide bills) .... $

If you need to look up automobile tax, please use https://edmv.ncdot.gov/MyDMV/

Did you make any major purchases during the year (car, boat etc)? .... ☐ Yes ☐ No

INTEREST PAID

Did you pay Mortgage interest? .... ☐ Yes ☐ No

☐ Attach Mortgage interest form 1098

Investment interest .... $

CASUALTY AND THEFT LOSS

Did you incur a casualty or theft loss or any condemnation awards during the year? .... ☐ Yes ☐ No

If yes, did the loss occur in a Federally declared disaster area .... ☐ Yes ☐ No

If yes, describe the property:

Amount of damage: $

Insurance reimbursement: $

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MISCELLANEOUS INFORMATION

Did you make gifts of more than $16,000 to any individual? .... ☐ Yes ☐ No

Did you retire or change jobs this year? .... ☐ Yes ☐ No

If yes, date of move:

Name of new company if applicable:

Did you incur moving costs because of a permanent change of station as a member of the Armed forces on active duty? .... ☐ Yes ☐ No

Did you pay any individual as a household employee during the year? .... ☐ Yes ☐ No

If yes, please provide payroll forms or fill out estimated tax payments in the estimated tax section below.

Explain:

Did you make energy efficient improvements to your main home this year? .... ☐ Yes ☐ No

Describe:

Did you receive correspondence from the State or the Internal Revenue Service? .... ☐ Yes ☐ No

If yes, attach correspondence

Describe:

Did you or a dependent receive an identity protection PIN from the Internal Revenue Service or have you or a dependent been victim of identity theft? .... ☐ Yes ☐ No

☐ Attach IRS letter

Do you want to designate $3 to the Presidential Election Campaign Fund? If you check yes, it will not change your tax or reduce your refund .... ☐ Yes ☐ No

Did you pay any alimony? If you're a new client or alimony payments are new this year, please provide alimony decree or divorce settlement .... ☐ Yes ☐ No

Annual amount: $

Do you have previous years of tax returns that are either unfiled or filed with unpaid balances due? .... ☐ Yes ☐ No

Did you have any sales or other exchanges of digital assets (including from an airdrop or a hard fork, or used digital assets to pay for goods or services? .... ☐ Yes ☐ No

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ESTIMATED TAX PAYMENTS

Due Date	Date Paid	Federal Amount	State Amount

Please provide any check images or receipts of the estimated tax payments made.
Do you expect a large fluctuation in income, deductions or withholdings next year? .... ☐ Yes ☐ No
If yes, please explain:

TAX RETURN FILING

You will have the ability to electronically sign your tax returns this year. Electronic signatures require that each taxpayer have an email address. Please confirm the email addresses you want the tax returns for electronic signatures sent to.
Taxpayer email address:
Spouse email address:

If you are choosing to sign your tax documents electronically, please note we will hold your original hard copies of documents for 30 days after signatures are complete. Please let us know how you will pick your copies up:

- ☐ I will come pick up my documents
- ☐ Please mail my documents back to me. I understand this will incur a delivery fee of $25.
- ☐ Please email me a scanned copy of my tax documents and shred the originals.

If we do not have a response for you, please understand that we will email your original tax documents and shred the originals after 30 days.

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NEW

COVID-19 INFORMATION

Did you receive State and Local Fiscal Recovery Funds (SLFR) under a program to support those negatively impacted by the COVID-19 pandemic for helping you with your mortgage insurance and/or home purchases, such as funds to pay some or all of the down payment and closing costs associated with your purchase of a home? ☐ Yes ☐ No

Did you receive a Paycheck Protection Program (PPP) loan? ☐ Yes ☐ No

If yes, did you apply for Paycheck Protection Program (PPP) loan forgiveness? ☐ Yes ☐ No

Are you a telecommuting employee who was required to “shelter in place” due to local COVID-19 protocols while working in a state that was not your home state? ☐ Yes ☐ No

Did you pay emergency sick leave wages to a household employee? ☐ Yes ☐ No

Did you pay emergency family leave wages to a household employee? ☐ Yes ☐ No

Did you receive any special unemployment benefits or compensation under the Coronavirus Relief Act during the year? ☐ Yes ☐ No

If you received any qualified disaster retirement plan distributions, did you repay any of the distributions in 2022? ☐ Yes ☐ No

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ENGAGEMENT LETTER

Dear Valued Client,

This letter is to confirm and specify the terms of our engagement with you and to clarify the nature and extent of the services we will provide.

We will prepare your 2022 federal and state income tax returns from information which you will furnish to us. We will not audit or otherwise verify the data you submit, although it may be necessary to ask you for clarification of some of the information. We will furnish you with questionnaires and worksheets to guide you in gathering the necessary information. Your use of such forms will assist in keeping the fee to a minimum.

It is your responsibility to provide all the information required for the preparation of complete and accurate returns. You should retain all the documents, canceled checks and other data that form the basis of income and deductions. These may be necessary to prove the accuracy and completeness of the returns to a taxing authority. Our work in connection with the preparation of your income tax returns does not include any procedures designed to discover defalcations and/or irregularities, should any exist. You have the final responsibility for the income tax returns, therefore, you should review them carefully before you sign them.

Any tax return is subject to being selected for review by the taxing authorities. In the event of such government tax examination, we will be available upon request to represent you and will render additional invoices for the time and expenses incurred.

It is our commitment to our clients to stand behind our work. We will correct any mistake made by us in the preparation of your tax return at no cost to you. Should a correction result in additional taxes due, we will not pay for the actual taxes or interest due. The correct documents must have been provided to us during the initial preparation and all relevant information fully disclosed. We reserve the right to outsource a portion of the service to a third-party provider, where all information will remain confidential and all services performed will be overseen by a CPA. All employees are trained on security guidelines and are bound by confidentiality agreements.

All invoices are due and payable upon delivery. Late fees are incurred 30 days after the invoice date, and are calculated as 10% of the balance due every 30 days (with a minimum late fee per month of $25). Your tax return will be filed once the invoice is paid in full and this engagement letter and the form 8879 have been signed and returned to our office. Any tax returns that have not been filed or picked up within 30 days of completion are also subject to late payment fees and additional fees for re-printing the tax return.

Upon completion we provide a copy of your tax return and any original documents provided. Requests for additional copies will incur charges of $50 per request paid in advance. Please sign this engagement letter in the space provided below. If there are other tax returns you expect us to prepare, please inform us by noting so at the end of the return copy of this letter.

With respect and appreciation,
Fisher, P.A.

Accepted by: Date:

Questions: